



Better Problem Solving With Knowledge Management

By Aprill Allen (aka @knowledgebird)

The keys to a long and productive life are a healthy diet and exercise, according to all the research done by health and zen professionals. We can accept that; it seems logical. Yet, if you're anything like me, you'll still reach for the less healthy option to eat, because it's easier. Our approach to knowledge management in ITSM mirrors our unhealthy lifestyle choices. We all know better knowledge management would make us more productive, but putting off writing a knowledge article, for example, is a bit like grabbing one more donut instead of spending time cutting up a big salad for lunch.

But, knowledge helps us make decisions and get things done, so wouldn't it be great if you could access the collective knowledge of your whole team, or indeed, your whole organization?

Knowledge: What Is It and How Do We Manage It?

The good news is that you're probably already doing some level of knowledge management; it's just that you may not be thinking of it in that way, and therefore, you might not be exploiting those knowledge assets as much as you could be. I've already mentioned that knowledge helps us make decisions and take actions. It's the know-how and know-what-todo. Knowledge management relies on organizations systematically using collective knowledge to achieve business outcomes.

There are lots of practices we can use in the workplace to capture and discover organizational knowledge. Here are just a few that you might find useful to your support team:

- **Mentoring** is an effective way to transfer tacit knowledge. It's ideal for those who need to learn skills that aren't available in formal training courses.
- **Peer assists** are similar to mentoring, but are short-term and common in project handover situations or new hire training.
- **Site visits** provide teams with a different perspective. Having your team spend time in another department strengthens their empathy for the customer and their understanding of that team's business needs and experiences.
- **Communities of practice** (CoP) is a group of people that interact over a common interest or skill, voluntarily sharing their knowledge and developing their own in return. It can exist within the organization or traverse practitioners across multiple businesses and boundaries.
- Expertise location refers to a system designed to help you find who you need when you need them. It could be as simple as a complete Active Directory profile or an enterprise social tool.

KCS Is Knowledge Management with Support in Mind

Support teams at the service desk and IT are terrific places within an organization to start getting healthier, because they are answering the same questions over and over again. Back in 1992 a methodology was developed called Knowledge Centered Support (KCSSM) to promote the reuse of knowledge, so support operations can be more efficient and effective. KCS was built on the principle that support teams answer the same 20% of questions 80% of the time.

KCS moves knowledge from being a proactive, just-in-case activity performed by one person or a team of documentation writers, to a reactive, just-in-time activity that becomes the way we get our work done. Using KCS, knowledge assets are created as by-products of the ordinary support workflow. Knowledge articles are available for reuse immediately, and are validated and reviewed on-demand as we interact with them.

Contrast that with the traditional approach to knowledge where there is a dedicated person or team writing and reviewing articles before anyone can access them in the knowledge base. A support analyst submits a request for a document to the docs team and it gets added to the queue; the time needed for new or updated articles takes longer; and, even though a solution exists within the organization's collective intelligence, no one can use it, because they can't find it. Or, alternatively—and what I so frequently see—there's a customer-facing FAQ, but no working knowledge base for service desk analysts to use and maintain. Adopting KCS practices will help your team to produce knowledge articles more efficiently, work with them more effectively, and ultimately improve employee and customer satisfaction.

In this white paper, I will explain how you can incorporate the foundational KCS practices into your IT support workflow.

Four Healthy Habits

KCS is a large methodology, with many moving parts, but even the leanest version of it will bring benefits to your support team and reduced resolution times for your colleagues and customers. With just four healthy habits baked into everyday workflows, support teams will notice at least one improvement early on—a reduction in the effort spent on reworking problems that have been solved before.

1. Capture

Knowledge capture happens as part of problem solving.

- Capture the customer's context. Describe the problem in the words the customer would use.
- Use complete thoughts, not complete sentences. Capture the knowledge at the speed of conversation, at the point of interaction. If you wait until later, you'll lose some of that customer's context and you're likely to inject your own. You'll already have the customer's context if they've submitted their problem through the service desk tool, but if you're logging a service call via phone or in person, writing in point form is encouraged.
- Search terms are candidate knowledge. When you analyze the search results of your knowledge base, you might find that people
- have been keying in a phrase that isn't returning results, but you have an idea of what it may be. Create an article with that keyphrase as the issue description. The next time someone searches for it, that article will turn up and the article will be reviewed on the spot, at the time of need.

2. Structure

A simple knowledge article template will help analysts note down relevant comments in the right places. It should show fields or headings for:

- Issue description/question
- Environment
- Resolution/answer
- Cause

A consistent structure provides context to the content of the article, as well as improving readability, usability, promoting quality, and assisting with search relevancy.

3. Capture

- Search early and often. As soon as you have the description of the issue and the environment, you have enough to search your existing knowledge articles.
- Seek to understand what you collectively know. Searching early on will show you solutions that have already been discovered, and may indicate that other analysts are working on a similar issue. When you don't find a solution, use your problem-solving techniques as you normally would, and finish the article off with an explanation of what resolved the issue. The complete article will then exist for others to reuse when the same problem comes up again.
- Count the number of times articles are reused. When you find or create a knowledge article relevant to an incident, it must be linked to the incident record. That's how you'll know how frequently issues are reoccurring, which is the basis of problem management. It also means you've got a full history attached to the incident record, in case you need to follow up later.

A culture of search is critical—reusing articles is what minimizes rework of support issues, so, even if you can't link articles to measure frequency, you must embed that search behavior into the workflow. Searching for what we already know is one of the healthiest habits any organization can have.

4. Improve

Reviewing articles at the time of need places the ownership of the accuracy on the person who's using it at the time. Therefore, ownership of the knowledge base is shared across the whole team or organization.

- Use it. If you find it to be incorrect or incomplete, you are responsible
- for improving it.
- Fix it. If you have the authority, fix it, if you don't...
- Flag it, so someone else can fix it.
- Add it. If you don't find an article to reuse, add it once you know the solution.

As articles are reused over time, they become trusted and can be reviewed for publishing for customer access in the self-serve portal. As we push knowledge closer to the customer, we enable lower-cost support options to take place, which is referred to as shifting left. A shift-left strategy is where we'll see the return on investment, but with KCS in place, it happens on demand, not just-in-case.

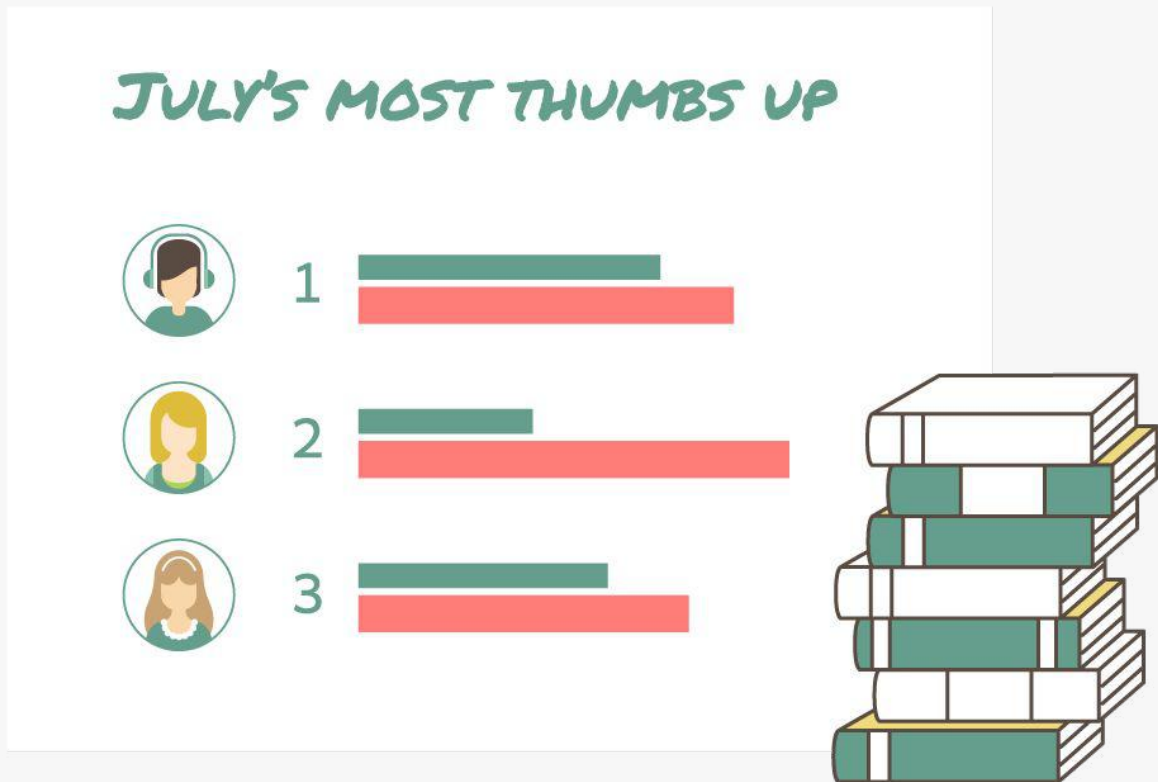
Customers may also have an opportunity to rate the helpfulness of articles and that gives you an extra tool for monitoring content health.

Keep an eye on those ratings and flag or fix articles that rate poorly.

Feed Your Culture

There's no getting around the fact that this new approach to knowledge requires organizational change. You will need your team to understand that knowledge works best as a team sport. New behaviors will need to be adopted, processes will need to be changed; and you'll need to look at your tools in new ways, too. Come to it with creativity and commitment, and you'll have a greater chance of success.

Coming up with a communications plan is the fun part. Invite your knowledge advocates to join you in coming up with a theme that will inspire your colleagues to see knowledge sharing in a new light—one that will encourage everyone to contribute to a shared outcome. Slogans and catchphrases based on a common theme are fun ways to keep reminding people of knowledge activities being an important focus. Posters in the workplace, with infographics created from your knowledge base data or other knowledge management practices, are a public way of celebrating success and contribute to sustaining your new way of working. Displaying that information on your company intranet works well, too. Here's an example of what that could look like:



An example of a leaderboard displaying the authors of the most liked articles for that month.

Building a knowledge culture needs more than ongoing communication; it needs commitment at the executive level. The importance of knowledge sharing and its contribution to company success and innovation needs to be woven into the corporate stories your leadership team tell at staff meetings.

The behavioral expectations should be set early on—during employee induction and training. There may come a time when you want to expand the knowledge management program to cover more teams and functions, for example human resources (who often get asked the same questions over and over). You may need the resources to tweak the tools you have and explore the ones you don't yet have. The advocacy and governance that your leaders bring will keep your knowledge efforts heading in the right direction.

Conclusion

We've all seen it happen: the changes we attempt to make for a healthier lifestyle fizzle out with a lack of commitment. But, now that you know what knowledge management looks like and how it helps, you should observe how your team members approach solving incidents and problems. Do they look for existing knowledge first? Do they review and update the knowledge they do use?

If you can see you have work to do, start small. Focus on one team and work with them to grow a knowledge culture. Explain the importance of knowledge sharing practices to the strategic goals of the whole organization and how your team's participation can help to improve their own experience of work.

As an achievable step, adopt and adapt just four healthy habits—the foundations of Knowledge Centered Support—into your workflow and existing tools and aim to make those activities so automatic that they become the way your team solves problems. Those four healthy habits include:

- Capturing knowledge
- Structuring it clearly
- Searching first
- Improving at every reuse

Train your team on what each of those habits involve and how they contribute to an improvement in problem solving, which will result in happier employees and more satisfied customers. Look for measurable outcomes that you can use to tell your knowledge sharing stories to the rest of your organization. Sharing your successes, no matter how small, keeps your own team motivated, captures the interest of other teams that you may be able to influence, and is essential for bringing executives and skeptical colleagues onboard.