Investing in Knowledge-Centered Support

Knowledge Management
Best Practices Within Service Management

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Organizations desiring to implement or improve on their knowledge management processes must invest in people and process as well as technology. A common mistake organizations make is focusing on the tools more than the processes and people. That practice has consistently led to failure, as technology is an enabler of knowledge management, not a critical success factor.

Over the past twenty years, the Consortium for Service Innovation has evolved Knowledge-Centered Support (KCS[SM]), a methodology that defines how to successfully implement knowledge management with service management, into a proven best practice that complements the ITIL® framework.[1] In 2003, in response to requests from its members for knowledge management best practices, HDI partnered with the Consortium to promote KCS in the technical service and support industry. This partnership resulted in the three-day KCS Principles course, which has continued to evolve, going through several updates over the past eleven years. As a member of the Consortium, HDI continues to participate in the evolution of KCS.

Invest in Your People

One of the things HDI has learned from Consortium members who've successfully implemented KCS is that the investment in people is critical to the successful adoption and ongoing success of this type of initiative.

HDI knows that there are many stakeholders who require training before, during, and after a KCS implementation. Some of this training must be developed internally, based on the tools implemented and processes defined by the organization, while some training is best provided by third parties. But where do you start?

The following people or roles will require an investment in training.

1. Professionals investigating knowledge management methodologies to adopt or enhance an existing implementation.
2. The KCS ADOPTION TEAM (i.e., program team) responsible for implementing KCS.
3. The KNOWLEDGE DEVELOPERS (i.e., support analysts) responsible for reactive knowledge management; that is, the capture, structure, reuse, and improvement of knowledge articles within the problem-solving process, including incident management and request management.
4. The KCS COACHES responsible for quality assurance and improving the skills of knowledge developers.
5. The MANAGERS or LEADERS who must support the KCS processes and the people involved in KCS.
6. The KNOWLEDGE DOMAIN EXPERTS responsible for analyzing knowledge reuse and gaps, participating in problem management activities, and developing proactive knowledge.

Let's examine the types of training that are needed and what is available today. We'll also evaluate the value of certifications within the adoption model.

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[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.

- **Professionals investigating knowledge management methodologies to adopt or enhance an existing implementation.**

  KCS Principles takes an in-depth look at the KCS methodology and the KCS practices. It covers what KCS is, why it's valuable, how to justify the investment, how to successfully implement it, and much more. HDI offers this course in the public classroom setting, where individuals and small teams can learn and interact with their peers. These individuals usually become early evangelists for adopting KCS.

  This course is also designed to help individuals prepare for the KCS Principles certification exam. The related HDI standard is published on the HDI website and included in the courseware.

- **The KCS ADOPTION TEAM (i.e., program team) responsible for implementing KCS.**

  When delivered in the onsite format, *KCS Principles* serves as an initial step in launching the adoption (or program) team. Also referred to as a "KCS design" workshop, participants learn about the expectations for the team, its deliverables, and how to successfully adopt KCS. Using the same courseware as the public classroom offering, the instructor will modify the delivery to help the team build a project plan and identify the tasks it faces. An additional one or two days is generally advised to allow the instructor and project team to perform project planning. When additional individuals are asked to join the team after the onsite has been completed, organizations will often send them to the public classroom offering to give them the same foundation as their team members.

  This course is also designed to help individuals prepare for the KCS Principles certification exam. The related HDI standard is published on the HDI website and included in the courseware. Many organizations desire or require individuals on the adoption team to hold either this HDI certification or the *KCS Practices* certification from The KCS Academy.[2] Both certifications focus on understanding the KCS methodology as defined by the Consortium's "KCS Practices Guide."

- **The KNOWLEDGE DEVELOPERS (i.e., support analysts) responsible for reactive knowledge management.**

  Support analyst training needs to be built in house. This is about helping analysts understand how KCS can help them as well as teaching them the processes, tools, and knowledge management skills they'll need to be successful. Some of this training (e.g., what it is, why you need it) can be licensed instead of built. HDI offers the *KCS Foundation* course, which covers these topics, in an online self-paced format; approximately three hours of seat time are required to complete the online course. It's also available as a one-day onsite course or a six-hour virtual classroom course.

  When drafting the training agenda for your support analysts, include the following:

  - » What is the KCS methodology?
  - » Why it is needed? What value will result from adopting it?
  - » What is your organization's vision? What are its objectives? How will it benefit/help the different stakeholders?

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[2] The KCS Academy is the outreach arm of the Consortium for Service Innovation, offering training and certification in KCS.

» Understand the new processes as defined by your organization.

» Understand the quality criteria and the content standard. Explain the template, the fields, and the knowledge lifecycle, as well as what makes a knowledge article good or bad.

» Position knowledge monitoring as a quality assurance process and explain how quality will be inspected and feedback given. This is where you introduce the KCS Coaches; define their role and explain their purpose.

» Explain the KCS competency model. This is where you want to create excitement about getting licensed and make sure they understand the requirements for earning their licenses.

» Explain the new metrics that will be used to monitor progress and measure success. Help them understand how they impact this success. Let them know that people tend to pay more attention to what is measured and that KCS will impact their personal performance assessment.

» Explain how to search and link knowledge articles within the incident/request/case management processes using the tools of your organization (USE IT).

» Explain how to add new knowledge based on issues they just resolved (ADD IT).

» Explain how to alert others when a knowledge article needs improvement (FLAG IT). This also reinforces that they own the knowledge.

» Explain how they can modify knowledge without needing it to be reviewed once they've been licensed (FIX IT).

» Address questions and objections. Since you've planned for this, weave these in the training as you go. But make sure you give them time to ask questions and challenge things. Your ability to respond can generate support for the process.

As individuals progress with KCS, they become licensed as KCS Contributors or even KCS Publishers who can contribute and modify self-service knowledge. Once individuals have had a successful experience with KCS and have been recognized as KCS Publishers by their organizations, they may elect to pursue the formal KCS Publisher certification from The KCS Academy.

• **The KCS COACHES responsible for quality assurance and improving the skills of knowledge developers.**

Coaching is a critical success factor for KCS, and coaching courses are available from The KCS Academy, HDI, and many other vendors.

Coaches need two types of training. First, they need to develop coaching skills if they don't already have them. This is about helping coaches learn how to successfully help others in their skills development. How they can give feedback without making analysts feel threatened? The *Coaching Skills for Successful Knowledge-Centered Support* course offered by HDI was developed by Dr. Beth Haggett, who designed The KCS Academy's *KCS Coach Development Workshop*. Both courses are designed to build coaching skills and help individuals prepare for the KCS Coach certification exam from The KCS Academy.

The second type of training relates to the knowledge monitoring process. In addition to understanding the quality criteria, KCS Coaches need to understand how to score knowledge

articles, how the organization is capturing this data and reporting on it, how the knowledge article quality index is calculated, what the goals for quality are, and how to perform coach calibration. This training is based on the organization's tools, processes, and quality criteria. It must be built in house or by a consulting company under contract for this purpose. These concepts are all covered in the KCS Principles course.

- **The MANAGERS or LEADERS who must support the KCS processes and the people involved in KCS.**

  Managers need training to help them adopt KCS and support their teams. They need to understand what KCS is, what its benefits are, and why the organization is adopting it. To satisfy this portion of their training, they can take the same *KCS Foundation* course as their analysts. Additional training is needed to understand their role in KCS, the modified performance management process, new reports and metrics, coaching as a critical success factor, and how they can support their staff and the initiative. They also need to be able to answer questions and objections raised by both staff and management.

- **The KNOWLEDGE DOMAIN EXPERTS responsible for analyzing knowledge reuse and gaps, participating in problem management activities, and developing proactive knowledge.**

  This training comes in the future, once your organization has a living knowledge base. Individuals who become KCS Publishers and who are recognized as subject matter experts in a given domain will be asked to serve as Knowledge Domain Experts (KDE). Due to the diversity of activities, the KDE is a set of roles, not necessarily one role. The KDE may analyze knowledge reuse, identify and evaluate trends, enhance knowledge articles related to high business impact and frequency of use, identify and fill knowledge gaps, participate in problem management and root cause analysis, troubleshoot or perform diagnostics, and develop proactive knowledge to be released with new products and services. KDE training will depend on the tasks and skills needed.

The *KCS Foundation* course will help you understand the Knowledge-Centered Support methodology, and is available in instructor-led classroom, virtual classroom, or online self-paced course formats. If you're looking to adopt or lead a KCS initiative, then *KCS Principles* is the course for you.

Invest in Certification

Research published in the journal *Science* reported that students who prepare for exams are 50 percent more likely to retain information than students who only attended classes. Certification exams allow individuals to demonstrate that they have a set of skills and knowledge, also known as competencies. When organizations pay for employees to attend training, they expect the individuals to build skills and increase their knowledge of the subject covered by the course. When certifications are available and the organizations places value on those certifications, class attendees are more focused on learning and preparing to take the certification exam, thus increasing knowledge retention. Once an individual passes a certification exam, they receive immediate recognition from the certification provider. This sense of accomplishment can be amplified when employers recognize their employees for earning certifications.

HDI introduced the first KCS certification in the industry in 2007. HDI now offers two certifications to recognize individuals for their understanding of KCS:

- **KCS Principles**

  This certification is for those individuals who want to demonstrate their knowledge of KCS practices and how to implement those practices. The certification exam is included with the KCS Principles course offered by HDI, but can also be taken separately. Individuals who are leading a KCS initiative, participating in a KCS adoption team, or seeking a deeper understanding of KCS should pursue this certification.

- **KCS Foundation**

  This certification is for those individuals who want to demonstrate that they understand KCS practices and how they provide value. HDI offers this course in both public (instructor-led) and online self-paced formats. This certification is ideal for those who plan to play an active role in the adoption of KCS.

Many IT organizations that adopt service management processes based on the ITIL framework will have every member of the IT organization attend an ITIL Foundation course and earn the ITIL Foundation certification. This ensures that everyone affected by the adoption understands the framework and is speaking the same language. Likewise, those responsible for leading specific service management processes will take advanced ITIL training. Similarly, support organizations who adopt KCS should ensure that everyone has a fundamental understanding of KCS, and they should encourage those individuals to pursue the Knowledge-Centered Support Fundamentals certification. Those who will be leading the initiative or playing an active role in the adoption should earn the KCS Principles certification.

Additional KCS certifications are available from The KCS Academy, which was introduced in 2011 as the outreach arm of the Consortium for Service Innovation.

- The *KCS Practice* certification is similar to the KCS Principles certification in scope and purpose.
- The *KCS Trainer* certification is required for anyone teaching a course offered by The KCS Academy. Individuals desiring to teach the KCS courses offered by HDI are required to become HDI Certified Instructors but are not required to obtain the KCS Trainer certification.
- The *KCS Publisher* certification is for individuals who can demonstrate that they've been filling this role in their organizations.
- The *KCS Coach* certification is for individuals pursuing the KCS Coach role. HDI's Coaching Skills for Knowledge-Centered Support and Coaching Skills for Quality Support courses prepare individuals for this certification exam and were written by Dr. Beth Haggett, the developer of The KCS Academy's KCS Coach course.

To learn more about the certifications offered by The KCS Academy and the prerequisites for each certification, please visit www.TheKCSAcademy.com. In addition to the courseware, the "KCS Practices Guide" and other white papers and case studies are available from the Consortium for Service Innovation at www.serviceinnovation.org.

More than 600 organizations have turned to HDI for training in KCS. HDI courses are based on the Consortium's "KCS Practices Guide" and were developed by KCS and ITIL experts who have helped organizations successfully adopt KCS in technical support centers. These are just a few of the organizations that have trained with HDI:

- Apollo Group
- Aramark
- Brigham Young University
- Capital Group
- Coca-Cola Company
- Constellation Energy
- HP

- PepsiCo
- Sanofi-Aventis
- Southwest Airlines
- Tampa Electric Company
- United Airlines
- US Army
- Wyeth Pharmaceuticals

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. An 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.

About HDI

HDI is the professional association and certification body for the technical service and support industry. Facilitating collaboration and networking, HDI hosts acclaimed conferences and events, produces renowned publications and research, and certifies and trains thousands of professionals each year. HDI also connects solution providers with practitioners through industry partnerships and marketing services.

Guided by an international panel of industry experts and practitioners, HDI serves a community of more than 120,000 technical service and support professionals and is the premier resource for best practices and emerging trends.