KNOWMAX

KNOWLEDGE MANAGEMENT PLATFORM - A COMPLETE GUIDE

Contents

1. Introduction

The introduction of KMS in any organization brings new hope. A fresh start in organizational culture is one of the exciting possibilities. The journey an organization takes with its KMS has a significant impact on business in the long run.

Knowledge is of no value unless it's put into practice. Organizational knowledge needs to flow in a cycle across departments systematically. Creation, curation, and dissemination of knowledge are essential for any organization whose practices are often so little discussed.

Practice, in reality, translates to a culture of knowledge sharing. Suppose we compare knowledge management as a practice to that of a sport. Just because a football player buys good equipment does not mean the player will become professional. The same goes for KMS and its usage.

Efficient creation, curation, and dissemination of knowledge is the bedrock of a successful Knowledge management project, whose practices are often so little talked about. This whitepaper will explore KM best practices for implementing the KMS and amalgamating it with current business processes. This guide helps knowledge creators and users navigate the proper usage of the platform for the highest level of optimization.

2. How to adopt Knowledge Management: The 5D framework
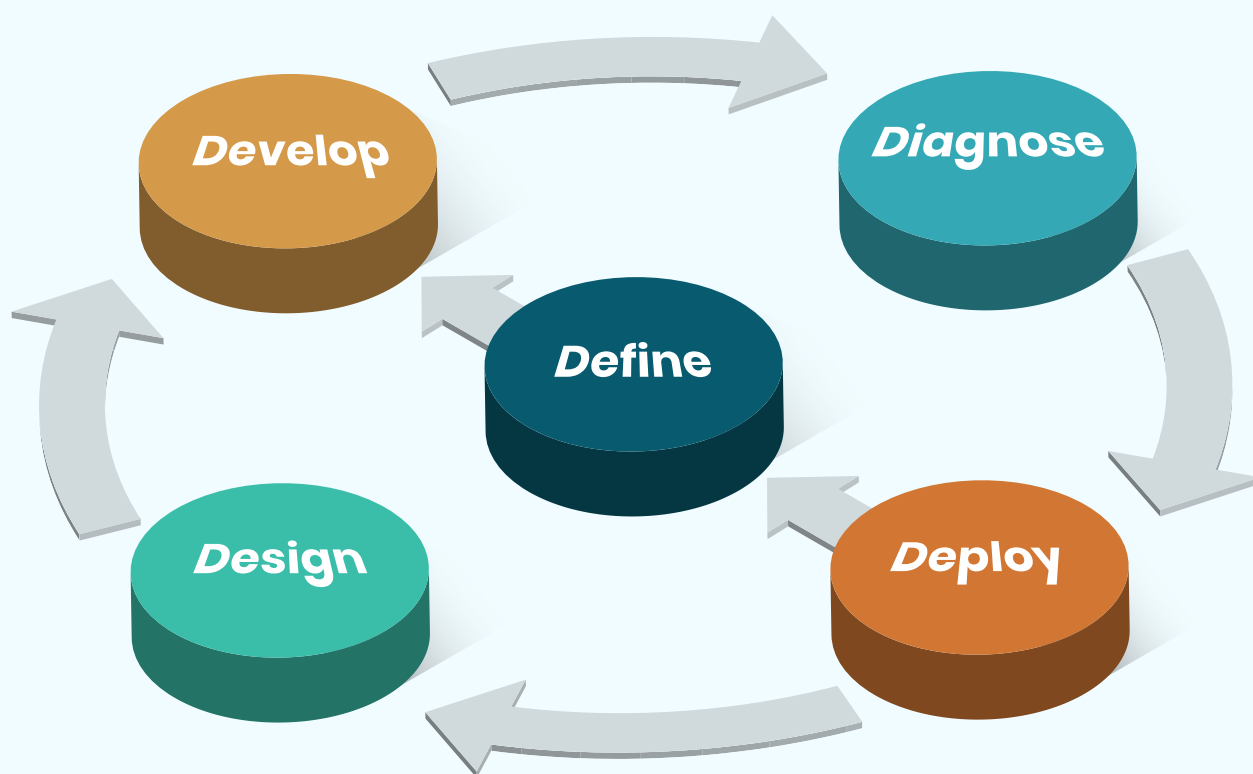
A 5D framework is the best way to approach the Knowledge Management implementation process from the start to the finish line.

If Knowledge Management were a marathon, think of the 5D approach as the preparation, and the pit stops along the way to reach the end goal. If one properly trains and participates in a marathon, they're more likely to achieve set goals than those who didn't plan and practice ahead in time. The example here perfectly matches what the organization should do with implementing knowledge management. As emphasized in the introduction, knowledge management is a culture built through the approach in the form of practices established.

2.1 What exactly is the 5D framework?

A 5D framework is a linear approach to implementing knowledge management phase-wise. This approach is highly constructive for first-time adopters to grab onto the practices that have helped successful adoption practices at various other organizations that have implemented knowledge management as a practice. As we sift through this document, we will explore each step in detail.

2.2 An overview of the 5D approach:

Diagnose
- ▶ Understand all pain points
- ▶ Identify top use-cases & scenarios
- ▶ Identify the knowledge gap

Define
- ▶ Define the focus group
- ▶ Assign users
- ▶ Build phase-wise strategy

Design
- ▶ Visualize an ideal KMS
- ▶ Tailor it with integrations
- ▶ Customize the KM functions

Develop
- ▶ Develop knowledge sharing culture
- ▶ Build a knowledge base
- ▶ Train internal teams

Deploy
- ▶ Execute a phase-wise deployment of KMS
- ▶ Look for gaps throughout the knowledge base
- ▶ Get users up to speed

3. Five Things to do Before Building a KMS

All organizations should firmly practice the GIGO principle when building their KMS. The GIGO principle or the Garbage In, Garbage Out principle runs on the theory that the results are mediocre when you put in mediocre inputs. But when you put in quality inputs, the output will be of desired quality.

So, before immediately creating another dump of content on the new knowledge creation platform, stop and take a moment. Analyze what you need to start building a high-performing KMS.

Following are tips on how to identify all the gaps for quality inputs that create quality outputs :

3.1 Make a list of all pain points

▶ What are the organization's overall pain points and individual departments or teams' pain points?

▶ What are the current data silos and level of transparency?

▶ Are internal teams able to access actionable and contextual information when they need it?

3.2 Compile and filter existing content

▶ Is there any presence of knowledge hoarding?Is there knowledge hoarding or data silos at the organization?

▶ Are there multiple versions of the same content?

▶ What is all the content that needs to be migrated onto the KMS?

3.3 Review KPIs and goals

▶ What are the current KPIs? Do they align with current KMS practices?

▶ What other measuring methods are used at the organization and are they appropriate to measure success?

▶ What are some new metrics that are going to be added with the incoming of the KMS?

▶ What are the goals the organization has set for the optimization strategy?

3.4 Review the SOP structures

▶ Some problems can be crucial internal problems like existing SOP structures.

▶ To review SOP structures,this approach may be followed :

- Is there a well-defined framework and structure for SOPs?

- Are the SOPs made and approved by the same person?

3.5 Visualize how to bridge the gap through knowledge management

▶ Has there been a review of all the steps above?

▶ Is each problem matched with the best possible solution?

▶ What new exercises can be brought in for better transparency among teams?

▶ Is the planning aligned for optimal utilization of the platform?

4. How to begin building the KMS?

The most crucial aspect to focus on to start building the KMS is to have the right resources and a vision in mind. The resources here refer to all the content that will go on to build a functional KMS. And the vision refers to how the right resources are allocated at the right places at the correct time for the ideal optimization of the KMS.

4.1 Match suited KM solutions to solve problems

The KMS has a wide variety of solutions, but what is the representation that best suits organizational content needs? For that, there needs to be retrospection on:

▶ Is all content up to date and ready for migration?

▶ Does the content need visual guidance?

▶ Is the content part of the decision-making process with multiple possible answers?

▶ Is it the content piece that a customer frequently asks of you?

That being said, internal teams know the organization the best, so take into consideration all the end-users, especially all support teams.

4.2 Establish a knowledge-sharing culture

Whether the organization has a healthy knowledge-sharing practice or are just implementing it, make sure to look at the advancements a KMS will bring into the organization.

4.2.1 Things to ponder upon

▶ What will the organizations look like with a new platform in place?

▶ What will the revamped knowledge-sharing culture look like, and what is the roadmap to achieve it?

Any practice cannot be built overnight; it takes many habits over time to inculcate. The best way to go about knowledge-sharing culture is to introduce new practices and overrule the redundant practices.

4.3 Assign a KM Owner & Knowledge creators

Implementing a KMS is quite some responsibility and it requires a team of experts to build it. Be it a team or a person, a product owner needs to be assigned to take up all knowledge management projects. A ratio of 200:1, as in 200 users to 1 knowledge creator is recommended while assigning roles for the KMS function.

4.3.1 What is the role of the KM owner?

▶ The primary responsibility of the KM owner is to take total ownership of all functions of the KMS. Managing the project end to end, from content creation to ongoing adoption

▶ A KM owner is the sole person or team responsible for all tasks regarding the KMS.

▶ The KM owner is the point of contact for all things related to the platform, from assigning tasks to building the platform to managing it.

4.3.2 Who are knowledge creators?

▶ Knowledge creators should essentially be subject matter experts, and they need to be hand-picked and governed by the KM owner(s).

▶ The role of a knowledge creator entails the ownership of creating content for the departments/queues they specialize in.

4.3.3 How to pick knowledge creators?

▶ The experience of knowledge creators needs to be diverse and not from one department only. This can be customized by choosing the best members from each department and making the team.

▶ To make things functional, one knowledge creator can be appointed to represent each department of content that is to be covered in the content creation on the KMS.

▶ The knowledge creators should be highly knowledgeable in the current practices and should have the ability to adapt to future KM practices.

▶ We also recommend picking up your best performing agent (in terms of your core metrics like C-SAT, Quality scores etc) or an experienced trainer to be a Knowledge Creator.

4.4 Set review meet-ups

▶ As soon as assigned teams start working on content, periodic review meet-ups need to be set up to track the progress.

▶ These review meet-ups must happen with all members concerned with creating content.

▶ The review meet-ups help internal teams understand the expectations and the progress rate and move ahead in a calculated manner.

5. Customize the KMS

The best time to start customizing the platform is as soon as the platform is ready to use. The platform is designed to suit and fit any organization. Make the platform resonate with the organization by customizing different sections of it.

How to customize the KMS?

5.1 Branding

▶ The first thing to do to customize a KMS is to add the company logo to the platform.

▶ Add brand colors throughout the platform and choose themes while creating content for the brand's personal touch with users.

▶ Focus on the visual aspects to ensure the KM resonates with the organizational values.

5.2 Integrations

▶ Integrate existing CRM and telephony platforms with the KMS for exceptional customer service.

▶ Curate an API list of all the customer information useful for automation of LOB/SOP processes.

K

The chrome extension widget

Chrome extension is a floating widget by Knowmax that provides a repository of knowledge to be accessed on any URL on google chrome. The widget aims to reduce time by eliminating the screen toggles.

Users can also chat concurrently using this widget through its CRM integration. The CRM integration allows matching of customer name to each knowledge piece opened on the chrome extension widget. This leads to efficiently solving more customer problems at the same time with zero confusion.

Get to know the widgets of Knowmax

The Knowmax knowledge management comes with cool widgets that make the platform interactive and highly user-friendly. Here's how they work:
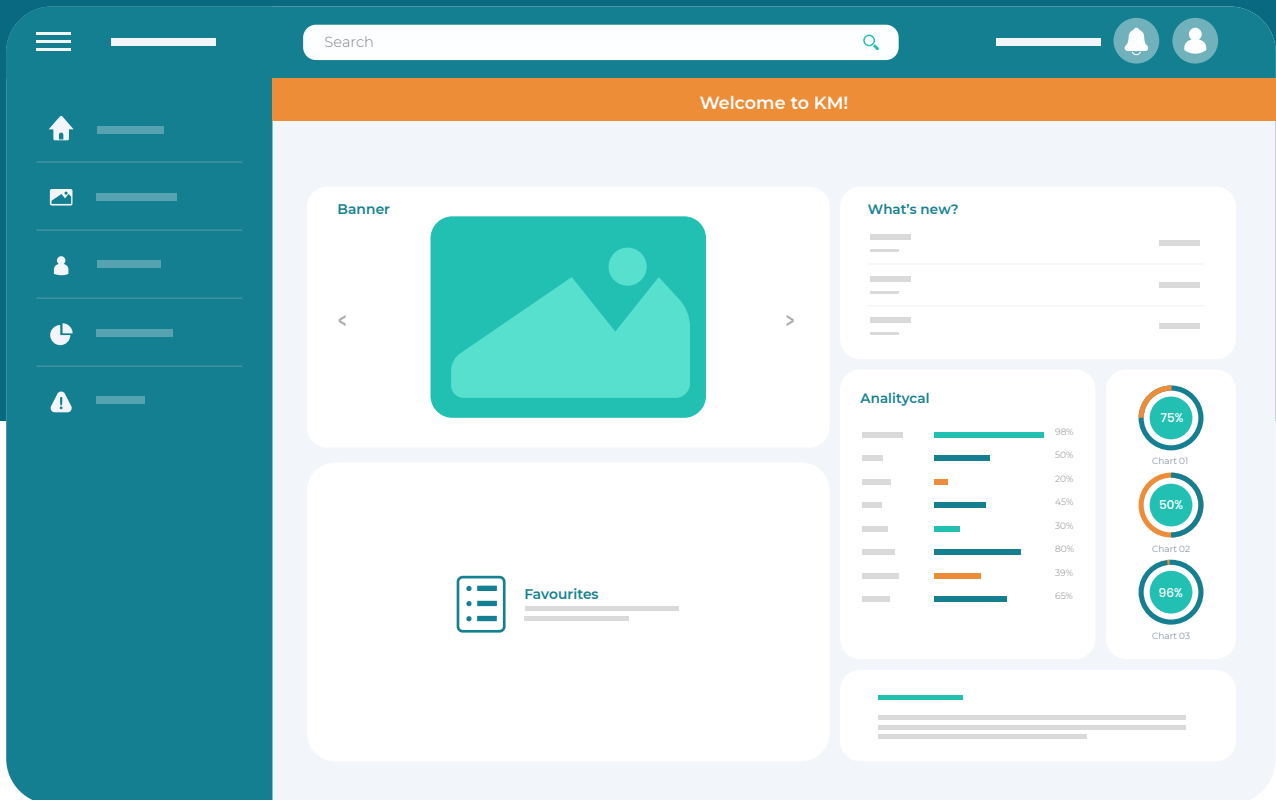
Chrome extension widget

Allows concurrent chat and searchability without screen toggle.

Banner

Put up announcements, recognize the talent of the workforce, and more in this section.

Search

Search content by keyword or title through this bar

Department selection

Select and view content department-wise with a drop down

Notification icon

Send notifications to users on content created and keep them updated

Ticker

Run alerts through the ticker for a quick grasp on important alerts
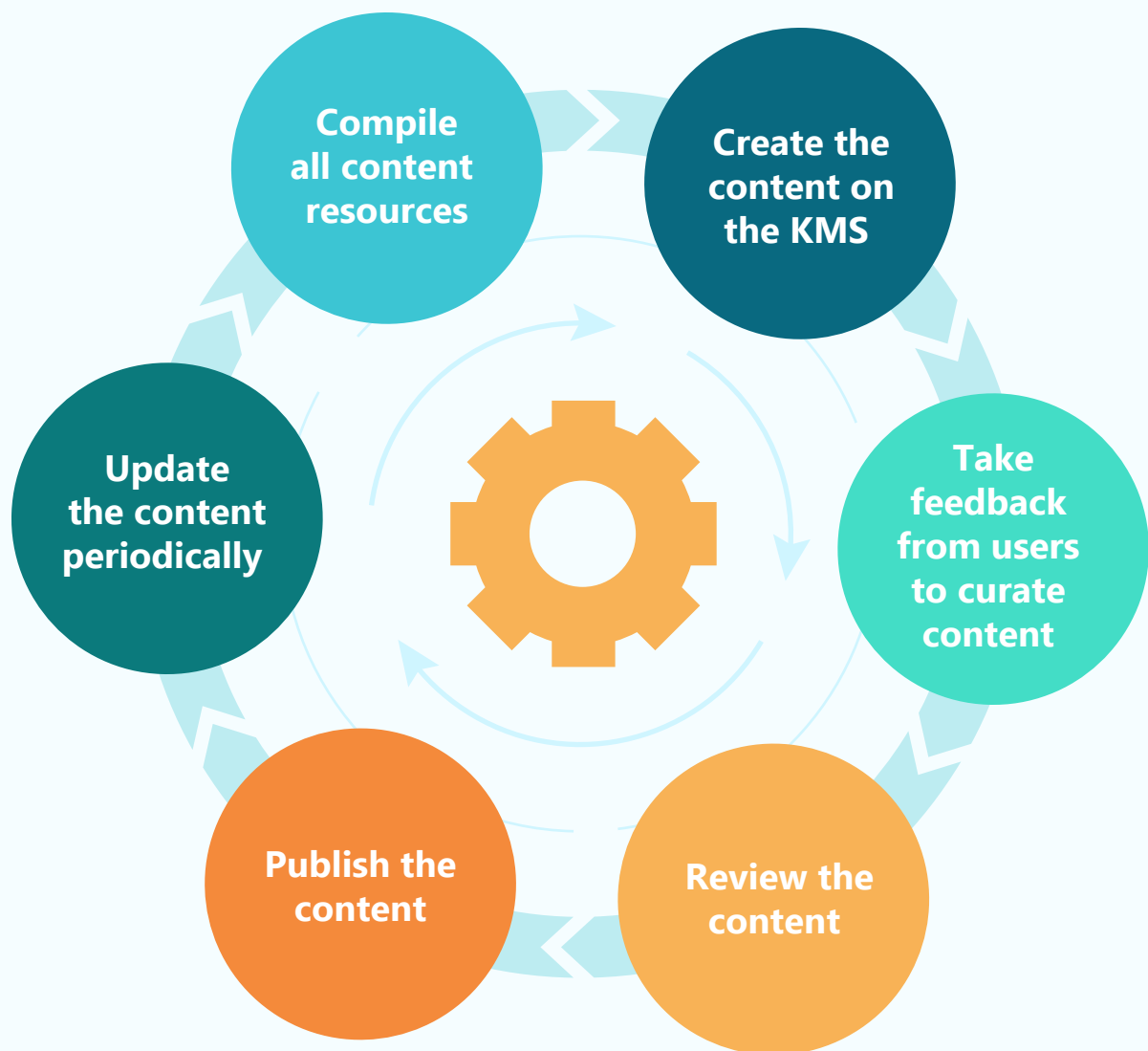
What's new section

All new content created or updated shows up on the homepage through this widget

6. Best practices for content creation on the KMS

Creating content on the KMS might seem like a mammoth task in the early stages. However, being familiar with the platform and understanding each function of the KMS capability will go a long way in helping create substantial content from the beginning.

6.1 The cycle of content creation

Compile all content resources

Create the content on the KMS

Take feedback from users to curate content

Review the content

Publish the content

Update the content periodically

6.2 Red alerts to look out for!

Content creation cannot be a smooth process if there is:

▶ No content readiness

▶ Missing matching keywords for each knowledge piece

▶ Incorrect attachments or multimedia files

▶ Untrained resources working on the KMS platform

▶ No categorization of all knowledge pieces

▶ Unstructured or unclear SOPs

▶ No clearly identified existing content owners

▶ Content spread in multiple silos

▶ No clear approval workflow or approval owners defined

6.3 The SOP checklist

One of the significant challenges in creating content on the KMS is placing the SOPs right. With a KMS, the organization has the ability to have utmost SOP compliance and reduce the chances of errors done by its users. But that cannot be achieved without this checklist :

▶ A set and well-defined framework and structure for all content

▶ Create SOPs to suit all content formats on the KMS

▶ SOPs are to be made and approved by designated knowledge creators

▶ SOPs are stored in a secured environment without dependency on just one person to access them.

▶ Complete risk assessment of SOPs

6.4 How to approach different content types: Knowmax edition

What format should you create content in?

If the content has troubleshooting and guided workflows

↓

Create a decision tree

If the content needs a digital manual or visual assistance

↓

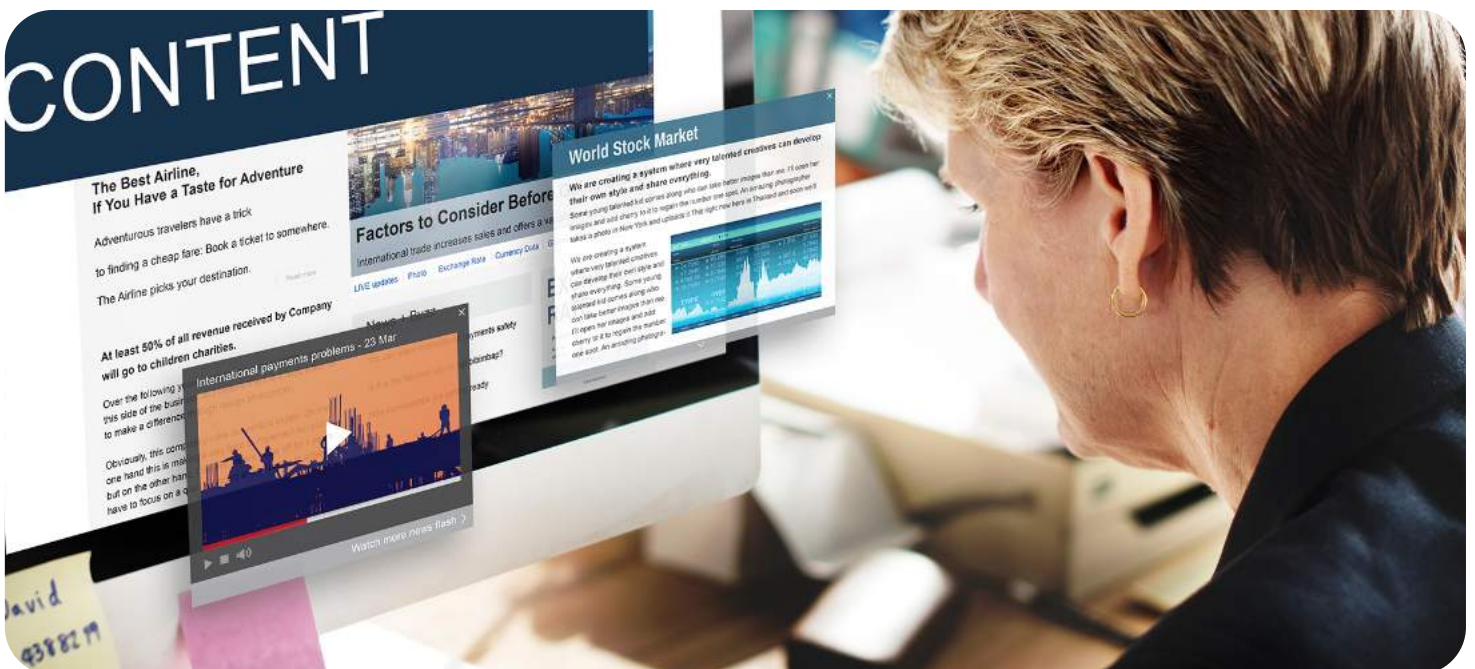**Create a picture guide**

If the content needs text supported explanation

↓

Create an article

If the content includes constantly asked or self-resolvable queries

↓

Create a list of FAQs

6.4.1 Decision Trees

▶ Make sure SOPs are converted into process workflows accurately

▶ Pick out and create top call drivers as a priority

▶ Learn the functionalities and possibilities of each decision tree

Watch how to create decision trees

Watch the video

6.4.2 Picture Guides

▶ Always capture and store high-quality images and screenshots

▶ Highlight essential points in less number of words

▶ Advice caution to end-users through the platform features if needed in all picture guides

Watch how to create Picture Guides

Watch now

6.4.3 Articles & FAQs

▶ Read and proof-read all content thoroughly

▶ Make text interactive with multimedia support

▶ For FAQs, make content crisp and comprehensible

Watch how to create Articles & FAQs

Click here to learn

6.5 Guidelines for publishing content

After content creation is out of the way, the focus should fall on publishing it for usage. The filters set while posting content make all the difference in accessing it after content is live.

▶ Review all content with a set of standard protocols

▶ Pick the most relevant title for knowledge pieces

▶ Type in keywords with the end-users in mind, use jargon they would use to search for the content

Learn how to publish content   Watch here

6.6 Tips for ideal content creation

Research thoroughly before beginning

Set approval criteria for all content

Write for the end-user

Decide on empathetic and soft tones

Use simple & clear language

Only put in actionable information

Keep content relevant and to the point

7. Tips to ease internal teams into using the KMS

Internal acceptance of new solutions can take a lot of time. Bringing in new practices might be unsettling for many. Following are a few activities that can be arranged within the internal team members to improve familiarity and liking towards the KMS.

7.1 State the purpose

No one likes to do things they are unaware of. Conduct sessions with employees and discuss their roles and responsibilities.

7.2 Create user-guides

Create user guides that include multimedia content for better understanding of the platform.

7.3 Feedback sessions

Always have a feedback session followed by a Q&A session to fill the Communication gaps.

7.4 Provide performance incentives

One way to ease users into adopting the platform is through monetary and non-monetary incentives.

7.5 Have practice runs

Before launching, implement it in phases and practice with internal teams before using it externally

7.6 Refresher Sessions

Have a Train The Trainer(TTT) session and refresher pieces of training to revisit and remember the capabilities of the KMS to ease the usage.

7.7 Weekly cadence calls with team leads on usage

Check on how the platform is being used, take notes on what's not working, and strategize how to make it work.

8. Ways to measure success

Success of the KMS needs to be calculated based on the goals that were set to be achieved through its usage. It would be best to assess realistic goals in terms of improved KPIs to have gradual but definite success with the KMS.

8.1 The number-crunching methods

Following are metrics to measure and evaluate the success of the KMS implementation. The way to go about the number-crunching method is to calculate metrics pre and post KMS usage for accurate measuring of success.

Track the performance of your KMS using the following metrics:

8.1.1 Average Handle Time (AHT)

Average Handle Time is calculated to find out the average time spent on a call. It reflects how well a user is equipped to handle a call or a conversation.

How to calculate AHT?

$$\text{Average Handle Time} = \frac{\text{(Total Talk Time + Total Hold Time + Total Post-Call Work)}}{\text{(Number of Total Calls)}}$$

8.1.2 First Contact Resolution (FCR)

First Contact Resolution helps find out how many customer enquiries or problems were solved within the first contact through assisted or self- support.

How to calculate FCR?

$$\text{First Contact Resolution} = \frac{\text{(Total Incidents Resolved - Total Re-Opened)}}{\text{(Total Incidents) X 100}}$$

8.1.3 Ticket deflection

Ticket deflection calculation refers to the organization's use of customer portals or other self-service methods to relieve tickets from the support team.

How to calculate ticket deflection?

$$\text{Ticket Deflection} = \frac{\text{Total number of customer self-service interactions}}{\text{Total number of users who submitted support tickets}}$$

8.1.4 Escalation rate

Escalation rate is the percentage of support tickets that have been escalated to a new support tier.

How to calculate the escalation rate?

$$\text{Escalation Rate} = \frac{\text{Number of interactions escalated}}{\text{total number of interactions handled X 100}}$$

8.1.5 Return on Investment

Return on Investment or ROI is a performance measure used to evaluate the efficiency or profitability of an investment.

Here is a basic template on how to calculate ROI

ROI Calculator

Field	Input	Field	Input
Number of tickets per month*		Number of tickets resolved in first call	
Number of Agents in the organization*		Monthly cost of handling tickets unresolved after first call	
First Call Resolution (FCR %)*		Number of tickets handled per Agent per month	
Loaded Cost per Agent per Month*		Average Handle time (AHT) in minutes	
Training Time (Weeks) per New Agent*		Monthly Training Cost	
Attrition (% of Agents leaving per year)*			

Improvements after Knowmax

Field	Input	Field	Input
First Call Resolution (FCR %)		Monthly savings from improved FCR	
Average Handle time (AHT)		Monthly savings from reduced AHT	
		Monthly Training Cost Savings	
		Total Monthly Savings	
		Monthly Cost of Licenses	
ANNUAL SAVINGS		**Return on Investment (ROI)(in %)**	

Note: This table is for suggestion only

8.2 Qualitative metrics to assess success of KMS
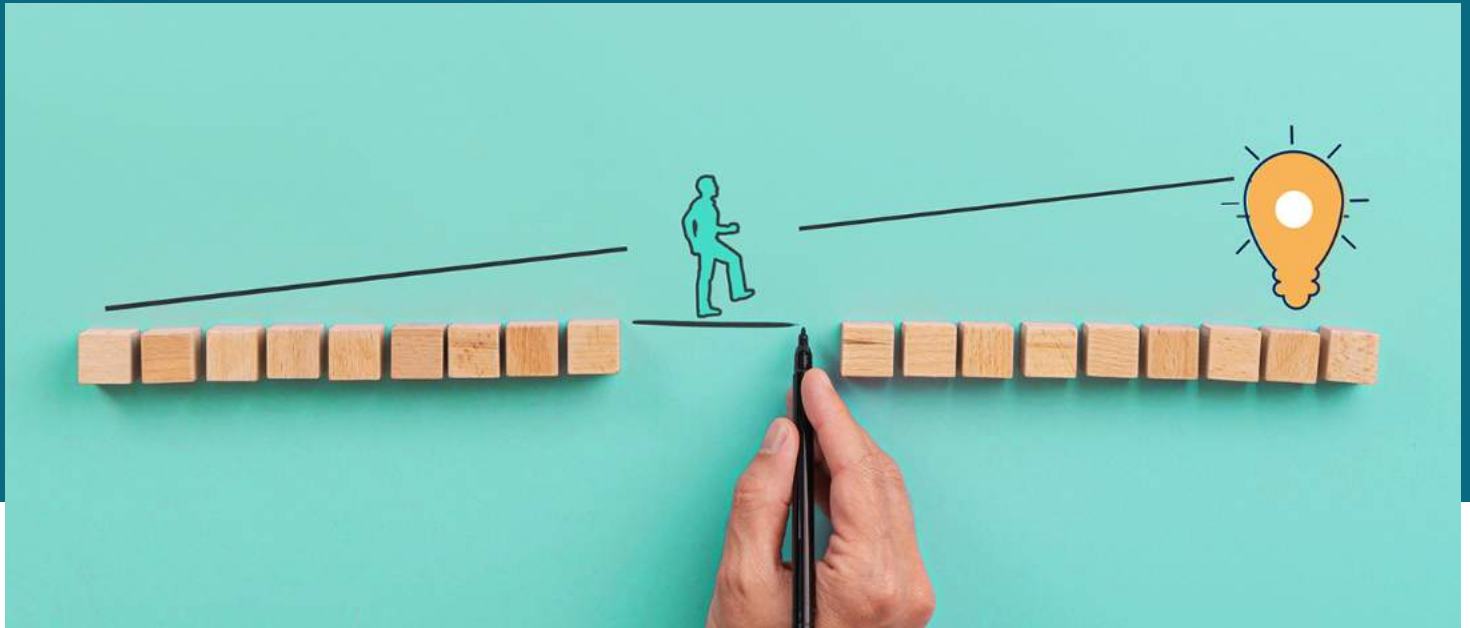
8.2.1 Enhanced CSAT score

8.2.2 Increase in agent satisfaction

8.2.3 Reduced time to proficiency

8.2.4 Improved SOP compliance

8.2.5 Reduced after call documentation work

8.2.6 Retention of intellectual property.

8.2.7 Elimination of data silos

8.2.8 Inculcation of knowledge management as a practice.

9. The way forward

The way forward with any KMS is to go steady and begin measuring benefits by applying the phased framework for platform implementation. This will help identify pitfalls for an optimal platform adoption and set teams up for best content creation and optimizing practices. Once internal teams are acclimated to the new platform, there is no turning back, and organizations can walk their CX journey with a spring in their step.

9.1 Have recurring platform review sessions

Is the goal for using the KM fulfilled? If yes, set more goals for the future that can be achieved with KM. If not, mark up reasons and work on the end goal with a new strategy.

9.2 Touch upon areas of improvement

Re-visit and check how the KMS works for employees at all levels and design improvements in human resources, technology, or processes.

9.3 Content review and revision

Content often becomes outdated quickly. Have periodic recurrences of review meet-ups to always stay up-to-date.

9.4 Keep up with platform updates to improve efficiency

With recent developments and additions introduced to the platform, creating strategies to avoid redundancies and having maximum efficiency is crucial.

9.5 KMS usage tracking and compatibility

Are all your users sincerely using the KMS platform? Assess the usage analytics and create an action plan for any gap in the usage.

9.6 Align activities with goals

Make sure that all your platform activity matches or aligns with organizational goals and success metrics.

9.7 Refresher training for users

Make sure to check how compatible the users are with the KMS. Arrange for training sessions periodically to stay up to date at all times.

9.8 Industry trend analysis

See what your competitors are doing. Implement the best practices and learn from the worst.Keep track of what the platform is being used for and assess how it is being used and if it is used to its maximum potential.

10. Conclusion

Rome wasn't built in a day, and neither is a knowledge base. If quality time and resources are put into the KMS building, the output will likely be of superior quality.

Efficient implementation in the present can yield business benefits for years down the line. Organizations that have taken the right approach toward Knowledge Management implementation witness improved KPIs quickly and continue to grow by revisiting and optimizing their KM implementation.

Connect or speak to our KM experts here for further information or assistance on the implementation process.

Contact Us

About Knowmax

Knowmax is a future-ready, full-suite Knowledge Management Platform that helps to efficiently create, curate, and disseminate knowledge for superior customer engagement across all touchpoints. Knowmax's innovative modules and features help you create a robust KM strategy for an enhanced CX. Built by CX experts with over a decade of experience in customer service, Knowmax understands the CX challenges faced by enterprises and is trusted by some of the leading fortune 500 organizations globally.

Get in touch with us

knowmax.ai