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Leading companies all over the world have significantly improved their customer service with well-executed knowledge management strategies. Knowledge management has transformed these companies, enabling them to harness the true value of information to improve overall service, cut costs and boost customer satisfaction and revenues. For other organizations, knowledge management initiatives have been plagued with costly setbacks and obstacles. What can be done to ensure the success of your knowledge management initiative? While the specific goals and implementation requirements of knowledge management vary. . . .
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Community-based knowledge creation for customer service is not that new. However, enabled by the ubiquity and ease of use of the Web and the availability of social-networking tools, it has gone to a whole new level, leading to the coinage of the term "social knowledge." While more prevalent in B2C sectors, social knowledge is also starting to matter in B2B sectors. How can companies harvest the best of social knowledge for the customer service they offer through their own contact centers and service organizations? How should they engage with customers on social websites? The following five-step plan will help increase the odds of success. . . .
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Is KM a Noun or a Verb?

Making the Case for a Technology Component

By Andy Moore, Editorial Director, *KMWorld* Specialty Publishing Group

There has always been a partisan divide among proponents, and critics, of knowledge management. On one side of the aisle, there's a primarily vendor-driven insistence that "knowledge management" is the sum of a series of technologies, somehow mashed up and desktopped in such a way that the management of corporate know-how is "automated," and the result is the seamless transfer of information in all its forms among the minions that trudge through the door every morning.

On the other side are the intellectual snobs who insist "knowledge cannot be managed." They'll concede that certain content management and analytics tools might smooth the pathway for "information management," but steadfastly refuse to accept that knowledge can be harnessed by anything as mundane as a business enterprise, and should remain in the textbooks, grad-student projects and snooty conferences they wear their bow ties to.

Me... I don't know. I guess I lean toward the former. From a pragmatic viewpoint, it's hard to argue with a corporation that wants to make it easier for employees to collaborate, access information and make better decisions. But I get the other side, too; there probably is a difference between "information" and "knowledge," and I don't have the mental weight to prove it otherwise. So I'll let smarter heads prevail.

Like Chris Hall. Chris is the marketing VP at InQuira. InQuira self-identifies mainly as a customer-service vendor, but, as you'll soon learn, they resist being labeled into an easy pigeonhole like that. I can confirm that InQuira says in its literature that it focuses on increasing customer satisfaction and loyalty through Web self-service, agent-assisted contact centers and enterprise knowledge management.

Knowledge management, eh? Well, let's see what he has to say about that!

"As a software vendor, you have to determine whether you want to label yourself as *knowledge management*," Chris began. "You guys at the magazine must sense the same issue." (No, never, I lied). "It really depends on the market served. For information-based industries, where the problems are 'break/fix' and the products are technically complex and the Web is the mainstream channel for support—high-tech and software companies—KM is a known mantra. They get it. They

know the lingo. They understand knowledge-bases, search analytics, ontologies, etc. They understand their goal is reducing time-to-answer, and fostering customer self-sufficiency." KM OK.

Chris followed up, though: "Unfortunately transactional-based industries—banking, insurance, healthcare—look at BPM or content management. Their problems are not break/fix... they're *procedural*. They don't care about putting things into a knowledge-base; they just want a repository for policies and procedures. They want to know *at step 7 of this transaction, what's the procedure to move to step 8?* If you try to talk KM to this type of customer, you'll be thrown out the door." KM not OK. "So, we adjust. Rather than stand under the umbrella of KM, we just say 'we connect people to answers.'"

***"To provide
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question."***

But Chris acknowledged that people DO get confused about which are the right technologies to deliver those answers. Which begged my main question: Is KM a noun or a verb? Is it something you *buy*? Or is it something you *do*?

"If it's a noun, that puts us into an ambiguous category. People understand what knowledge is, but putting the two terms together can be confusing. If you consider it a verb, that's a little better, but it still leaves the action—whatever it is—up for interpretation," Chris explained. "We believe KM is essential for any company that cares about the understanding, development and delivery of answers, regardless of their industry, or department or delivery channel... Web, phone, email, chat," said Chris. "But that's a very difficult set of circumstances to get right. So KM has to be a combination of essential technologies, methodologies and experience."

Chris wanted to make a point here: "Here's the difference between a piece of content and

an answer: an answer is actionable. And in order to provide an answer that can be acted on, you have to understand the question," Chris continued. "Your wife, your kids and your buddies all speak to you differently (you're telling me! I said), but they might mean the same thing (I doubt it! said I)."

Ignoring my stupid interruptions, Chris continued: "It takes experience to get to that level of interpretation. Experienced customer service representatives pretty much understand 80% of the inquiries coming in to them. Those are 'the knowns.' What we do is package up all these known top questions, along with the many ways in which these questions are asked. We call these 'intents.' *What did the person intend to ask with that query or question...?*"

What about the 20% that are not "knowns," I wondered? Chris was realistic and frank: "If you can be effective at 80% of the questions coming into your contact center, that's darned good! And even with staff turnover and financial stress affecting service levels, it's not that hard to get *repetitively* better at answering common questions," he insisted. Chris thinks it's not that different than the contact center of the past. "It's always been done through training, coaching, system monitoring... we're just now taking all that training and bringing it down to a search string. We expect the level of technology today to say: 'You said *that*, but you probably meant *this*.'"

Chris is unequivocal and unapologetic that KM sometimes requires a "massive" (his word) amount of technology. Many people I talk to try to diminish the technology component, preferring the softer, more "people+process" approach. Chris is the first to admit that because of the large technology component, his company has been focused on larger organizations. So to widen the net, they are implementing a SaaS model so that smaller companies can take advantage of the solution.

That marketplace—on-demand KM, rented services, whatever you want to call it—IS seeing a lot of action right now, mainly expressed through acquisition and partnerships between really big players (Oracles and Siebels) and specialized service providers. "That should take the COST element out of it for smaller companies," said Chris. "But the NEED situation comes down to whether you are currently giving your customers the answers they need. If you are already, with your current staffing etc., then you don't need KM. I don't know if that puts you in the minority or the majority, but if you're able to provide customer answers, and you don't have a lot of turnover and you don't have a complex portfolio of products, then kudos to you."

But I get the feeling he thinks that is a rare animal indeed.

Which side of the aisle you sit on will determine the way in which you interpret the following articles. But be assured: there IS some level of KM in your company. The trick is not so much determining how, but *why*? ■

Proven KM Strategies

Five Best Practices That Ensure Knowledge Management Success

Christopher Hall, Vice President, Product Strategy, InQuira



Christopher Hall

Christopher Hall has more than 20 years of business experience as a senior marketing and product strategy professional in the enterprise software industry. Prior to joining InQuira, Hall was the vice president in charge of the global product strategy initiatives at KANA Software. Earlier, Hall was vice president of worldwide marketing for Chordiant, where he pioneered the company's customer experience branding.

Leading companies all over the world have significantly improved their customer service with well-executed knowledge management strategies. Knowledge management has transformed these companies, enabling them to harness the true value of information to improve overall service, cut costs and boost customer satisfaction and revenues. For other organizations, knowledge management initiatives have been plagued with costly setbacks and obstacles. What can be done to ensure the success of your knowledge management initiative?

While the specific goals and implementation requirements of knowledge management vary significantly for each organization, there are some best practices that have been proven to be common across industries and organization types.

Below are five of the most crucial best practices that can benefit your knowledge management initiative, both in the near- and long-term.

1. Envision, engage and encourage. The phrase “people, process and technology” has been used so often it has become cliché, but that doesn’t mean it’s not true. Having the right knowledge management technologies in place is critical to establishing a scalable, successful knowledge management initiative. But the tools and technologies are only a mechanism that supports the underlying processes and the people who contribute, review and use the content on a daily basis.

How will you capture, reuse, maintain and improve knowledge? Envisioning these processes—and how they will be enacted—is the core of a successful deployment. Similarly, these processes are only as effective and successful as the people employing them. Engaging contributors, users and customers in using and improving the systems implemented is clearly vital.

For internal audiences, this means that from the top of the organization on down, everyone understands and buys into the vision of knowledge management. Customer support isn’t simply about being on a case-closing treadmill; it’s about sharing and improving knowledge and getting better at delivering service. In addition, staff members’ involvement in knowledge

management needs to be formalized as part of their job descriptions and performance evaluations.

For customers, this means that systems need significant testing and quality control before being rolled out. Phased implementation strategies are key to future success. Support portals need to deliver a great experience up front and provide high-quality, meaningful content right from the beginning. Further, customers need to be actively engaged, through discussion forums and interactive sessions, where critical feedback is gained.

For both audiences, champions of the project need to address the question,

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“What’s in it for me?” and they need to be able to articulate the value of the solution for everyone who’s expected to interact with the system.

In fact, the whole area of change leadership—getting people aligned with the initiative, getting them trained and coaching their progress—is probably where executives need to place most of their focus.

2. Usable content is king. Thinking of your current content repository of support incidents as the ultimate source of

knowledge will invariably lead you in the wrong direction. While important as a source of customer context, these cases are a poor substitute for true solutions-oriented knowledge content. Instead of simply using a search engine to provide a window on content that may be flooded with back-and-forth exchanges and little solution value, it is far better to develop quality content during the course of solving current cases. It is vital that this content development be made part of the resolution workflow.

Indexing content that resides in other repositories can be a good way to quickly provide agents with access to useful content through search. However, in the long run, it is best to re-author the content that is related to the key service issues so that this content is more readily available through the multiple information retrieval options the knowledge management system provides.

When re-authoring content for inclusion in the knowledgebase, break the information up into logical units or solutions. Agents should be able to quickly gain access to useful solutions—content that is structured for access and reuse. It is vital that this content is concise, and that it provides a clear picture of the customer context. One of the most effective methods for developing meaningful content is to fully integrate support agents into the knowledge creation and maintenance process.

Empowering agents to contribute their expertise when demand requires it is particularly useful for filling in knowledge gaps, especially for those infrequent or low-value questions that you have deliberately chosen not to address in the initial implementation because they do not heavily affect customer satisfaction or costs.

PROVEN KM STRATEGIES *continues on page 4*

3. Accelerate the review process. It is important to start with an understanding that knowledge content is fundamentally about answering questions. Further, this information is often very time-sensitive in nature. As history has shown, once an issue is detected, the bulk of inquiries into that subject arises within the first 30-45 days. That's why it's critical that organizations strive to accelerate their review processes as much as possible, while taking the steps required that ensure the quality and usefulness of information. Ultimately, organizations have to weigh the risk of having mistakes appear vs. the value of having content available quickly. This balance will be determined by your risk/reward policies, your industry standards and liability limits.

How do you get quality knowledge content out quickly? Following are the key points:

- ◆ **Don't review everything.** Rather than having everything reviewed before publishing, it tends to be far more effective to provide authority to those qualified to publish directly, and then review samples of published content to ensure content meets your quality standards.
- ◆ **Don't do technical reviews outside of the customer context.** A technical expert can review a solution and determine whether it sounds plausible or not, but it is very difficult to confirm whether it works or not without the specifics of the customer situation.

Often it simply isn't practical to replicate every customer's environment in a lab, recreate the issue and verify that a given fix works. It is far better to have technical reviews happen to content in the process of actually using it. Then users can flag or fix content that needs correction or

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improvement, which ensures accuracy while speeding content availability.

Quite simply, your front-line customer service agents may be your best litmus testers for problem-resolution content. Allow them the authority to flag or revise content as they engage with the user. Content that has been flagged can then be reviewed for accuracy and consistency.

4. Reward content creation that works well. Rather than requiring a specific number of content pieces per month or building incentives that encourage meaningless contributions, focus your authors and agents on delivering new content or content revisions that evolve from actual customer engagements. Setting up a reward system that is derived from content usability and supported by a system that tracks content usage and success rates will engender greater participation and higher satisfaction ratings from both content authors and content users.

Managers should be looking at broader trends and desired business outcomes as their starting point for content creation. For example, a desired business outcome may be to reduce average handle time. Managers then need to put specific goals

on activities like content creation, but map those goals to business outcomes. Similarly, participation rates need to be evaluated for each staff member. Finally, these goals need to be made part of employees' performance reviews.

5. Think long term. Knowledge management can't be viewed as a one-time project with a discrete beginning and end. While any initiative is made up of disparate projects, knowledge management needs to be viewed as something larger... something *permanent*. Organizations need to be involved in knowledge management for the long haul, and this needs to be reinforced from the top down and across the organization. Every team member needs to understand, "Knowledge management is part of who we are and what we do."

Building a long-term knowledge management strategy will underscore the organization's commitment to customer satisfaction and can be marketed as a competitive differentiator. The resulting improvements in customer service and reduced costs will pay dividends far beyond the cost of the technology.

Knowledge management initiatives have been proven to deliver a range of significant benefits to customer support organizations, including increasing staff efficiencies, delivering cost savings, improving customer satisfaction and much more. By focusing on a few key best practices, your organization can optimize the benefits of a well-thought-out knowledge management initiative and start enjoying the benefits of this technology sooner rather than later. ■

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InQuira is a leading provider of intelligent knowledge solutions that connect people to the answers they need.

InQuira provides enterprise knowledge solutions for Web self-service, contact center support and knowledge intranets, built from a single technology platform that makes it possible for companies to provide a consistent customer service experience across Web, phone and community channels. For additional information, visit www.InQuira.com.

Harvesting Social Knowledge for Customer Service

By Anand Subramaniam, VP, Marketing and Inside Sales, eGain

Community-based knowledge creation for customer service is not that new. However, enabled by the ubiquity and ease of use of the Web and the availability of social-networking tools, it has gone to a whole new level, leading to the coinage of the term “social knowledge.” While more prevalent in B2C sectors, social knowledge is also starting to matter in B2B sectors.

How can companies harvest the best of social knowledge for the customer service they offer through their own contact centers and service organizations? How should they engage with customers on social websites? The following five-step plan will help increase the odds of success in harvesting social knowledge for customer service.

1. Assess the opportunity.

Companies need to first assess the opportunity for social knowledge harvesting in the context of the nature of their business (e.g. B2B, B2C etc.) and the customer queries they get (simple vs. complex).

Social knowledge creation has been more common in B2C sectors because it is easier to attain “critical mass” with more contributors and less specialized knowledge. This means a bigger harvesting opportunity in B2C than in B2B (see figure 1).

Customer inquiries fall broadly into four categories—informational, transactional,

diagnostic and advisory. Generally, informational and transactional queries tend to be of low-to-moderate complexity while diagnostic and advice-seeking queries are of moderate-to-high complexity. Informational and transactional queries, therefore, are more likely to be resolved by social knowledge.

2. Identify high-value knowledge.

Social knowledge contributors have varying levels of reputation, prolificacy, and influence, which most social networking tools measure (number of posts, acceptance rate, number of connections, etc.). The social knowledge value (SKV) of contributors can be estimated by using a combination of these metrics. Knowledge from high SKV contributors is ideal for “deep dive” harvesting, while that from low SKV contributors can be ignored or skimmed (see figure 2).

3. Engage current customers.

Customers are key to the initiative—both as knowledge contributors and posters of queries on social sites. Businesses need to make sure that queries posted on social sites are resolved in a timely manner, especially if they are from high lifetime financial value customers, whom you usually provide “platinum service” (e.g. proactive offer to chat, rapid service levels, etc.). The risk of non-resolution of customer queries is high on social sites because of broad market exposure.

If high financial value customers are also high SKV contributors, they not only present an opportunity for deep-dive knowledge harvesting but are also important for collaborative product development and social brand management. See figure 2 for a framework for knowledge harvesting as part of customer service strategy.

4. Harvest and unify.

Contact centers need to make sure that social knowledge goes through the same robust quality control processes as internally generated knowledge, so that it can be made part of a common multichannel knowledge-base. Likewise, social customer interactions

should be added to other multichannel interactions as part of a unified customer interaction hub (CIH), which consolidates interactions, knowledge, business rules, analytics and administration in one place for better customer experience, service consistency and process efficiencies. The hub approach allows agents to view customers’ social interactions, in addition to direct interactions with the business, for full context retention and rapid resolution.

5. Account for sector-specific and legal factors.

Social monitoring tools, social knowledge and robust customer service compliance workflows can help businesses in sectors such as pharmaceuticals and personal care products to track adverse incident reports and act on them rapidly in compliance with regulations.

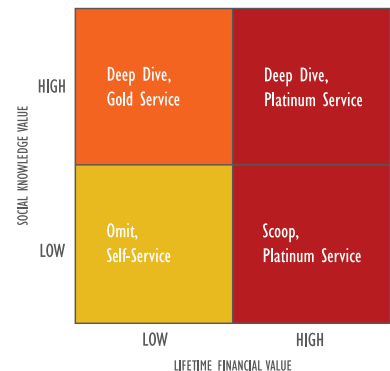


Figure 2: eGain Knowledge Harvesting & Customer Service Framework

All businesses should make sure they are not violating copyright laws while harvesting content from social websites.

When this step-by-step approach is implemented, social knowledge is bound to add significant value to any enterprise in the form of improved customer loyalty, enhanced brand equity, lower cost of knowledge creation and reduced customer service costs. ■

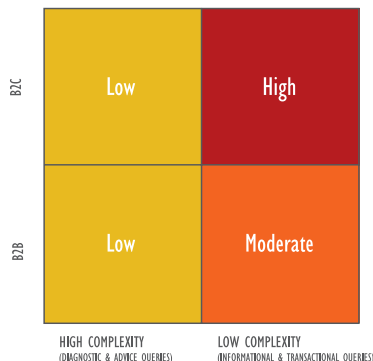


Figure 1: eGain Social Knowledge Opportunity Matrix

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eGain (www.egain.com) is the leading provider of multichannel customer service and knowledge management software for on-site or on-demand deployment. For more than a decade, hundreds of the world’s largest companies have relied on eGain to transform their traditional call centers, help desks and Web customer service operations into customer interaction hubs (CIHs) that help improve customer experience and optimize contact center performance.

Why a CCM is Not a CMS

Or Why You Shouldn't Confuse a Whale with a Fish

By Howard Schwartz, Ph.D., VP Content Technologies, SDL XySoft

People are beginning to realize it is a mistake to call some systems a “CMS” (content management system), when they are really referring to a “CCM” (component content management) system. The difference is critically important. By making this category mistake and confusing a CCM for a CMS, some organizations are failing to convince their management that they need a specialized system called a CCM. Their management or IT organizations think they already have one, when in fact they do not. Just as a source control system (which does versioning) is not a CMS and just as a Web content management (WCM) system is a specialized type of CMS, so a CCM is a unique specialized system for the management of another critical enterprise function: namely the management of technical information.

To understand this question of categorization, it is perhaps helpful to look at a less technical analogy. At first blush, it would seem reasonable to classify a whale as a fish. After all, a fish is a sea creature that swims and lives in the water. And by these criteria, a whale certainly would fit the category. But we know to reject this categorization, because our scientific classifications trump the more intuitive categorizations. A whale is a mammal and not a fish; therefore, we give scientific classification priority on how we organize our thinking.

This analogy is useful when we decide what kinds of systems to include in the category of CMS (our “fish”). It is not the case that the systems we are calling a CMS (our “whale”) can’t fit into that CMS categorization. They can. But that categorization misses something essentially important about these specialized systems. A CCM has capabilities that are not in every old CMS. A whale could be a fish but....

The Content Management Evolution

This kind of category mistake is common when there is a paradigm shift occurring in technology adoption and a new technology category is emerging. We have seen this before in the emergence of the content management category itself. Remember the days when we had only document management systems? When content management systems first emerged, no one had heard of them either and they had to differentiate themselves from document management

systems. Then HTML and the Internet came along and imposed new expectations on corporations for managing their interaction with customers over the Web. With this change emerged the Web content management system. A WCM differs from other kinds of content management systems because it is focused on particular problems and processes in the enterprise that have distinctive challenges and business objectives.

The same paradigm shift is now happening with the emergence of CCM as a system distinctive from a CMS. This emergence is part of a much broader shift that is occurring in how organizations manage technical information across the enterprise. What is driving this transformation is the shift from a book-oriented writing paradigm to topic-based writing using the XML standard called DITA (Darwin Information Typing Architecture).

The manifestation of this shift is the changing role of traditional technical writers or authors into true “information developers.” *Technical publications* as a discipline is becoming much more like software development in that many individuals contribute “modules” or “topics” in their own particular area of expertise. They create these “disembodied” or “contextless” topics and then roll them into larger blocks of content that ultimately culminate in publications or content delivered to customers. The implications of this shift are enormous; organizations have crossed the chasm from “book methodology” into “topic-based authoring.”

One such implication is the need for technology infrastructure that was not previously needed. In the past, when working in book methodology, technical publications organizations only had to version whole documents or chapters, for the most part. While they did seek to reuse content across publications, they typically did so only by cutting and pasting from book to book or chapter to chapter. Since books or chapters were the unit of tracking, versioning was important but could be handled with naming conventions on the files system or with source-control systems.

With the move to DITA and topic-based authoring, what once was a suite of documents has now become thousands or millions of topics that all have to be managed and versioned. These topics, moreover, may need to be managed in multiple languages and may be used across many different deliverables such as administrative guides, user

guides, Web pages, PDFs, help files and other outputs. There may be variations for advanced and new users. Tracking the version of each topic and graphic that goes into each deliverable is simply not possible with a file system... especially if you have documentation of any substance or need to manage versions and their relationships to each other and to larger publications.

Confusion Between CMS and CCM

When many organizations begin to understand DITA, they ask themselves, *do we need a CMS?* (See our earlier white paper, “Dare I Do DITA Without A CMS,” available at www.sdlxysoft.com.) After trying DITA on a file system in some prototypical way, organizations quickly realize they will need a process to manage the tens of thousands of topics they have.

So they opt for a CMS. This is when they are in danger of making a significant category mistake. What they really need is a CCM—not a CMS. What’s the difference? There is a whale of a difference.

Forget for a moment the names CMS and CCM—names don’t really matter. What an organization needs in order to manage DITA is a system that can track not only versions of topics and graphics but *relationships among* topics, graphics, maps, publications and deliverables. The problem of managing DITA is not the versioning of discrete “objects”—*it is the problem of versioning all the objects in relationship to each other at the same time*. Tracking the moving relationships of all these components presents the problem of managing information in a topic-based architecture. Without understanding DITA, the tracking system can’t possibly manage the relationship of all the moving parts. It is this linking of versions to each other, to larger blocks and to publications that the standard content management system can’t manage out-of-the-box.

The name CCM is now being adopted by analysts and users to describe a system which has this key layer of functionality, above and beyond the standard versioning and workflow of every basic content management system. This layer of logic is at the heart of what allows DITA to deliver an ROI.

What is ultimately at stake for those in technical publications or information development is to realize that CMS is a category that hurts them more than it helps. If they ask for one, they will likely find that the IT organization has already invested in one. And chances are that that CMS or “collaboration platform” is not one that can understand DITA natively. But those who understand DITA know that the key issue is managing the relationship of versions to each other. And to do that, the CCM must understand DITA. This is why a CCM is not a CMS and why *a whale is not a fish*. ■

Knowledge Management, Made to Measure

Using Metrics as a Roadmap to KM Success

By Tim Hines, Vice President, Product Management, Consona CRM

Management 101 tells us that success in business starts with setting goals and measuring progress toward them. Service and support leaders are metrics masters: from electronic status boards to thick monthly reports, filled with charts and tables, leaders manage by the numbers.

Traditionally, measuring support operations has been straightforward. Shorter hold times are better; higher abandonment rates are worse.

Knowledge management is harder to measure. For example, how many articles should be written? As anyone who has waded through an overgrown, under-maintained knowledgebase can tell you, more content is not better, unless each article is a quality, unique, findable solution that answers a question users really ask.

There's no simple trick to optimize a knowledge management initiative using metrics. But, in conjunction with our customers, we've developed five measurement principles for success.

1. Measure cases and knowledge together.

Incident management systems can tell you how many cases are closed and what the backlog is. Conventional knowledgebase systems can tell you how many articles have been authored, or how often a particular article has been opened. But none of these factoids alone explains *what* to do: what accomplishments to recognize, which team members need coaching or which knowledgebase articles are having the greatest business impact.

Metrics that combine case tracking data with knowledge management data answer the business questions that really need to be answered: who is creating value in the knowledgebase? What gaps keep us from more effective self-service? What's the highest value product improvement we can take?

Knowledge management doesn't happen in isolation. Knowledge management reporting can't either.

2. Use role-focused dashboards. Line managers have to assess employee performance, so they need reports to identify how staff is reusing, creating and improving knowledge. Product managers need reports that highlight the most valuable product enhancements. KM program managers need to know if there are any bottlenecks in the publication process. And executives want to know the financial impact of knowledge.

Customized dashboards for these and other roles are an essential part of any KM program. Too often, a thick sheaf of generic reports is sent to everyone, regardless of role. People who would benefit from a targeted subset of metrics are deluged with irrelevant information.

3. Take the long view. Knowledge management initiatives are long-term programs—they grow and evolve (or get into trouble) relatively slowly. With the right measures, it's possible to trend activities and outcomes to see what's happening. But looking at data a week or a month at a time simply doesn't help—the signal of the long-term trend is buried in the noise of typical weekly variations. Knowledge program managers need to be able to compare results over a period of at least 12 to 24 months.

While processing a year or two of measurement data is a simple requirement in principle, applying it in the real world can be maddeningly difficult. This is because transaction logs, especially from busy self-service sites, can be enormous and complex—in some cases, processing even a day's worth of data can take longer than a day!

Fortunately, technology is emerging that makes long-term analytics a practical reality, even for the highest-volume support sites. Although the new reporting technology uses complex features like in-memory analytical engines, highly efficient data models, and advanced filtering algorithms, the result is simplicity itself: reports that give program managers the ability to see the long-term trends and take action to make sure they're going the right way.

4. Make the metrics your own. Many of the most valuable knowledge management metrics require some degree of judgment. What percentage of self-service interactions was plausibly successful? Should knowledgebase authors get credit when they reuse their own content, or only when others do? What about editors—do they get credit, too?

When tools provide metrics like this, they're generally packaged as a black box, calculated using a proprietary formula that customers can't change. In effect, vendors are saying, "Trust me."

Executives who request the ROI from call deflection won't settle for "trust me." And neither should anyone else. Ensure that reports are based on assumptions you can examine and formulas you can change to meet the specifics of your business.

5. Ask the Next Question. At their best, metrics don't just answer questions: they prompt new ones. Average handle time is going up? OK, but why? Maybe effective self-service is deflecting the easier cases, or a new product release is creating previously unknown problems, or support staff aren't searching the knowledgebase as often as they should. Interesting data in one report often creates the need to generate three new reports.

True ad-hoc reporting can't be done with most knowledgebase tools. That's because the OLAP (online analytical processing) solutions they include use an off-line process to massage the data for reporting. The predefined reports work fine, but new reports are difficult or impossible—if that off-line process wasn't programmed for the report in advance, too bad.

No matter what reports come "out of the box," eventually there's a need to answer a different question. That's when the reporting infrastructure really needs the kind of hyper-efficient in-memory technology that's built specifically for generating new reports on the fly.

KM success requires that all stakeholders know where they're going and how they're doing. With measures that pull together knowledge and case management, dashboards that meet role-specific needs, timeframes that give perspective, assumptions that are understood and adjustable, and the ability to ask new questions, KM metrics become effective guideposts on the road to success. ■

Consona CRM offers the *only* combined knowledge management and incident management product that is KCS *Verified* v4 by the Consortium for Service Innovation. More than 1,000 customers worldwide use Consona CRM solutions to manage process efficiencies, drive revenue and enable extraordinary customer experiences. Visit www.consona.com/crm.

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