

## Service with a Smile

*Developing a knowledge-aware service and support portal is a team effort*

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Too many organizations spend lots of time and money developing knowledge and support resources without getting the business and performance outcomes they need. There's no mystery as to why: it results at least in part from the way organizations historically have approached knowledge organization and delivery.

Support tools typically are developed by functional groups that operate in organizational silos--documentation, training, business management, information systems or support services and help desks. While each of the resulting knowledge resources may be well structured, none alone is sufficient to allow the company to realize the bottom-line value of knowledge synergies. That's because each tool has a different goal and is designed, independent of any larger considerations, to achieve it.

This is still the norm. And with access to only these kinds of tools, the individual performer in many service, sales, troubleshooting and analytical jobs must him- or herself identify the appropriate knowledge to apply to a given situation. He or she must know what to find and then search, retrieve, evaluate, filter and finally integrate the relevant strands of content to create meaning and usefulness.

This isn't the most efficient way to structure a customer-facing support operation. What is needed instead is an integrating viewpoint and business leadership that will sponsor the collaboration required to achieve it.

To illustrate how this works, let's look at a case study of a KM challenge that a large government agency faced.

### **ORGANIZED CHAOS**

Some 3,500 call center representatives in this organization fielded millions of calls. Many were seasonal workers and turnover was high--about 50 percent. To assist callers, the service representatives used manuals, bulletins, policy directives, Web sites, software applications, directories and lists of contacts and tools. Their primary reference manual, containing the strict legal and policy regulations that governed their work, was 18 inches thick.

And that was only the beginning. The reps used complex software applications to access caller data and address more than 40 types of caller questions and problems. Each software application had a different interface, and some even used different labels for identical data. So much effort went into teaching employees how the applications were structured and how to navigate them that little time was left for reps to become familiar with the other aspects of their jobs.

Still, the reps were expected to internalize the organization's mandated best-practice approaches to numerous tasks and questions. Management made it clear that quality must be of paramount importance and that one employee should be able to resolve all of a caller's questions and issues. But the high turnover and the number and complexity of the questions and problems involved in fact made this impossible.

In the agency's smaller regional offices, the problem was even more substantial: a single employee sometimes had to play up to five roles, each of which would have been handled by a dedicated full-time employee in a larger office.

### **INTEGRATED SOLUTION**

Management put together a team of business analysts, trainers and KM professionals to address this business problem. That's where I came in. We started by developing realistic descriptions of the situation, scrutinizing tasks, goals, the way real callers ask questions and the mix of problems they call about. We mapped tasks, knowledge resources and tools to individual roles.

After comparing possible solutions, we concluded that continuing the pattern of independent activity was simply not going to work. The organization needed an integrated portal solution co-sponsored by its various functional groups. After initial design prototypes showed that training time could be reduced dramatically by providing just-in-time, just-enough, just-right knowledge, management agreed to sponsor the project.

The specific solution was a portal designed to accomplish some traditional and some innovative goals. It would have to fulfill a number of needs:

- **Ease of use.** The portal needed a simple, intuitive design that would require little user training or orientation. It had to streamline access to knowledge by offering resources--knowledge, data, tools and task support--filtered by employee role, task and caller problem. It also had to allow service reps to move quickly between different areas and views of the portal as they handled different tasks and caller problems. Finally, the portal had to support rapid change in work processes as best practices were redefined.
- **Ease of communication.** The portal needed to give reps a way to get assistance using e-mail or threaded discussions. It also had to provide access to search engines and to the Web sites of other departments and groups.
- **Built-in guidance.** The portal had to hide the complexity of the three underlying software applications by providing a presentation layer of wizards to guide service reps through tasks and caller issues. Buttons on the task wizard dialog boxes would give access to specific knowledge. The design would have to make it possible to develop and maintain task wizards quickly, without programming or creating hard links to the software applications.

### **THE RESULTS**

The portal has transformed training and workflow. Building knowledge resources into the task wizards has largely eliminated the need to train people on software and business processes. And because the wizards mask the software, all the service reps see is the wizard interface.

Since task-related knowledge and agency best practices are structured into the tools, reps can focus on listening, gathering information and interacting with callers, guided by the software. The interface also permits the reps to change roles as needed. In the end, the portal reduces complexity, structures process and delivers the ability to provide timely, high-quality service.

This work was not hard to do, but it was hard to get done. Organizational politics are more difficult to overcome than technological, conceptual or design problems. But over time, the benefits of collaboration outweigh the comfort of control. Now, the agency's cross-functional portal development team is working to integrate performance support and KM into a broader set of jobs. While the silos have not vanished, the barriers to both development and organizational performance are coming down.

The path to demonstrable results for a knowledge strategy is through achieving integration of knowledge into working contexts. Continuing to apply technology to siloed independent efforts will require huge resources without commensurate rewards. Those will only come, in my experience, from a synergy among peers.