Ask the Experts

How knowledge management supports your changing operation

The CCMA hosted an online Ask the Experts seminar with Verint focusing on how knowledge management supports the contact centre. Questions were asked and answered during the event. Below are additional questions from delegates and answers provided by John Bausfield, Solutions Architect and resident knowledge management expert at Verint, and Paul Beilby, Knowledge Manager at Equiniti.

Question	Answer
How do you ensure you receive up to date and timely information from other key business areas? Do you have appointed content creators for each team/sensor checkers?	Equiniti: Yes – We have content creators for each business sector (4) – their role is to maintain these and liaise with the team(s) for updates. We have a calendar view locally that is team shared to see what impacts are coming up as a standard each month. This gives the creators the time to reach out in advance to prepare for updates. Verint: in other client instances we have recommended the formation of a 'Knowledge Office' concept, whereby a wider team of stakeholders is collectively responsible for ensuring business and operational updates are fed into the dedicated Knowledge curation team so that changes can be considered for content updates or new content publication. This ensures that that responsibility of Knowledge ownership and curation still remains with an expert team, but that consideration of Knowledge is distributed and better communicated within the business.
How many people do you employ in solely managing the knowledge content?	Paul from Equiniti gave an answer to this on the webinar, but more generally, one of the development goals for Verint's KM Pro is to make administration as light-touch as possible, and to require no technical skill to be able to operate the Administration Console, and require no IT involvement. This allows it to be managed by SME's or team-leads as well as dedicated, skilled Knowledge teams. There are a range of administration resources in play with our clients, from 'part-time' Knowledge teams to dedicated full time teams. This doesn't necessarily scale 1-to-1 with the size of the organisation, and depends on the rate of change, the complexity of the knowledge structure, and the number of teams or work-groups involved. The example given of the Logistics company is both multi-brand and multi-lingual, with both European and global languages in use for Self-Service and Contact Centre. They have a dedicated team

	of 3, but utilise resources from around the organisation, and support over 4000 agents.
For the 7 FTE you have managing knowledge how many pages of content roughly does that correlate to?	Equiniti: Content per FTE is a difficult thing to track. We focus more on quality over quantity – How many bits of feedback do we get per article? We spend more time editing existing articles based on search results. FTE are also split up into existing support areas, we have a large SharePoint library of information that needs updating we utilise 2 FTE per week to do this. Averaging approximately 150 updates per week on SharePoint. In 2019 we created (based on 4 FTE at the time) 4500 articles but, made 11,000 edits based on user feedback, searches and suggested content. Break that down to FTE it works out at about 93 creations per month. Verint: The total number of articles per FTE is not always a constant element between our clients. Something which does correlate to an effective knowledge solution is receiving and processing suggestions or feedback (in addition to business or operational changes), and one of our clients saw 47,000 pieces of feedback over 2.5 years, averaging roughly 40 submissions per week. This allowed them to grow their knowledgebase from roughly 3500 articles at go-live to over 5000 articles now.
What technology do you use to ensure the knowledge management search engine is effective?	Verint's KM Pro delivers superior - semantic - search results and lower user-effort to find the right help quickly, without the need for time intensive system training, nor any reliance on machine learning. In essence, our Search understands that a word can have different meanings and doesn't require that the advisor enters specific keywords contained in the articles to produce effective search results. An example would be in telecoms, where an advisor or customer may search for Router, but be given results containing 'modem' - these terms have a relationship in language, and mean similar things, so the Search is able to connect those concepts together without the Knowledge owner defining those as keywords. This capability is out-of-the-box, but can be added to for customer specific terms as part of the implementation, or over time. This means that KM Pro delivers better CX and user productivity (call handling time improved, first contact resolution rates improved, transfers and complaints reduced, higher CSAT etc.) from day one of go-live and immediately as knowledge content is added or improved, without any Administration activity, or without IT involvement.

When on a call with a customer it's important for the customer experience that the relevant 'bit' of information is delivered quickly to the agent. Some knowledge systems deliver pages of content and an agent has to sift through it to find the 'bit' that they need to help support the customer. How do you deliver these 'bits' of information at the right time rather than reams of content?	This aligns well to the difference we see between Information and Knowledge. Information is seen as having documents with many pages of detail around processes or guidance and requires that the agent first find the correct document, then has to further look for the answer within that document. Knowledge, in contrast, is delivering the specific answer to a specific question without needing to look for it. Differentiating these in a knowledge management solution is partly about approaching the curation differently, and taking a Knowledge-first approach, but also about being able to curate and present that knowledge within a system that makes it easy to consume. Our best practise guidance would be to focus articles on one specific 'action' - this could be single question, single answer, but in many cases an answer can be more nuanced. What we recommend is to split the article into multiple sections and focus the 'core' answer on the question being asked and give supplementary information within these additional sections. This allows the advisor to clearly see what is required, but also expand their conversation or understanding in a more effective way. We also support Decision Trees, which can break down long processes or guides into simple steps, navigating to the relevant steps without being overwhelmed with extraneous information. These can reduce time and effort, and even increase accuracy by allowing the advisor to focus on the specific instructions relevant to the customer query. KM Pro's semantic search and automated content clustering then allows advisors to easily find and navigate through knowledge in a conversation-like way, easily finding answers, and navigating to the next most likely question without further effort. This approach comes into its own when Knowledge is integrated into other systems such as CRM. Because the CRM (for example) has additional context around the call, this can be utilised by the Knowledge tool to automatically suggest relevant, contextual knowledge without the advisor searching. This is what we regard as 'zero-click' knowledge.
Can you add formal assessments to test their understanding of process and policy?	Verint's KM Pro doesn't include assessments or testing processes. However, within Verint's solution portfolio, we do have other solutions for Performance Management and Gamification which can allow for the assessment of understanding based on Knowledge Management as the key source of those processes and policies.

Do you use standard templates or structures for how you structure your knowledge pages? If so how did you get to these templates and how are they working for you?	It is possible to create bespoke content structures within Verint's KM Pro to align to article structures, channels, integrations, or meta-data. The presentation of these content structures can then be tailored in a bespoke User Interface aligning to the use cases, touch points, and brand look & feel required. For each client we would spend time understanding the requirements of the content, the requirements for presentation, and how knowledge needs to be utilised by the end-users. They can be modified over time to adapt to new requirements, channels, etc.
I've seen some knowledge systems link to online training or e-learning modules where an individual requires a refresh on business processes or other key skills, especially new starters. Have you linked your knowledge base into your LMS and how has this worked in practice?	Some simple ways to link LMS with KM are to assign skill levels, or competence levels to the users (normally via Single Sign On, so it's automated), and publish specific knowledge articles, guidance, announcements, or even simply sign-posting to LMS modules. Because of the skill level visibility, these can be filtered and published only to those who likely require them. This could also integrate to a Performance Management tool, such as Verint's, to automate the publication of LMS modules into the KM tool based on performance metrics, or conversely, trigger Coaching or Performance Plans automatically based on low utilisation of the KM tool. We have also deployed the ability for advisors to request training directly from the KM tool, which simply submits a request into the appropriate team, but can give them visibility via KM Statistics into what the advisor was struggling with, and what they may need help with, in addition to the specific request submitted. Some of our clients have utilised Verint KM Pro's API to do this themselves in some cases. Equiniti: we haven't taken the decision to link KM into online training or, E-learning. We work on a face to face level and introduction. When new starters come into the business, we spend an hour of their first 3 days demonstrating KM, going over live examples of how the system works to build the foundations in as a tool to use day to day. Longer term, we are involved in every upskill that happens to give steer and take away any feedback/questions that appear during the training and development

What administration resource is required to man this? There were examples of multi brands, what about multilingual?	The example given of the Logistics company is both multi-brand and multi-lingual, with both European and global languages in use for Self-Service and Contact Centre. They have a dedicated team of 3, but utilise resources from around the organisation, and support over 4000 agents. One of the development goals for Verint's KM Pro is to make administration as light-touch as possible, and to require no technical skill to be able to operate the Administration Console, and require no IT involvement. This allows it to be managed by SME's or team-leads as well as dedicated, skilled Knowledge teams. There are a range of administration resources in play with our clients, from 'part-time' Knowledge teams to dedicated full time teams. This doesn't necessarily scale 1-to-1 with the size of the organisation, and depends on the rate of change, the complexity of the knowledge structure, and the number of teams or work-groups involved.
Is the tool available in multiple languages? If so, is this manually inputted by employees with translation skills or is it automated?	Translations can be managed via built-in workflows, and can integrate with third-party automated translation services, but generally we advise translation to be done by employees for best accuracy. Our workflow enables a 'master' article to be submitted on creation or change to the relevant translation team automatically to ease this ongoing process. Verint's KM Pro is available in 30+ languages, including the majority of European languages. This is for Search, user interface, and content support.
How much would you lean towards one question-one article?	Our best practise guidance would be to focus articles on one specific 'action' - this could be single question, single answer, but in many cases an answer can be more nuanced. What we recommend is to split the article into multiple sections and focus the 'core' answer on the question being asked and give supplementary information within these additional sections. This allows the advisor to clearly see what is required, but also expand their conversation or understanding in a more effective way. Verint's KM Pro also automatically clusters contextually related content around each article, so an advisor asking a single question will automatically be prompted with similar topics or questions for a conversation-like interaction with the Knowledge. This reduces the need to overwelm in a single Question/Answer article.

What would you say are the key steps to designing the processes to collect & verify knowledge from around the organisation?	Equiniti: Key steps for designing the collection of information is – knowing who to contact. Sharing with each other names/channels/areas who can provide information. if there is a business area missing – introduce yourself. Show them the benefit of KM – We set up an Outlook inbox to ease people into the idea of copying in an area for updates rather than, trying to get everybody to use our suggested content right away. It takes approximately 20 days to pick up a habit. Something you can't change overnight. Verifying knowledge – If from product owner areas – we create the content with content design, push it out to a test audience (small number FTE and TL) to gather additional questions they have. If knowledge comes from SME front line or, TLs, we'll do the reverse. Go to the product owner/SME with created content to verify the information. This is key to do rather than, waiting for a reply then creating as – its easier and quicker to update and get live.
Can the system connect to third party feeds e.g. updates in Clinical Governance such as CODIV 19 Guidance?	Yes, external feeds can be displayed within the Verint KM Pro Knowledge Portal. We would recommend these are clearly defined as separate from Knowledge itself to avoid confusion in messaging to advisors though.