FEATURING INSIGHTS FROM:

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It is time to say goodbye to conventional knowledge management.

It is time to say hello to a more intelligent approach to managing customer contact knowledge.

With the wrong vision, the wrong measurements and the wrong approach to technology, conventional knowledge management is quite simply the wrong fit for the modern contact center. It does not empower organizations to deliver exceptional customer experiences while operating within the confines of a budget.

A central issue: an ineffective balance between humanity and technology.

Technology is supposed to empower human employees, but in the traditional knowledge management scenario, employees waste countless hours doing work for the technology. They spend time creating, uploading and adapting knowledge material based on the constraints of the system rather than the needs of the agents and customers.

The "knowledge intelligence" concept reverses this trend. It leverages technology for the upkeep, measurement and optimization, allowing humans to focus on designing the knowledge strategy and then properly tailoring data to the needs of customers, agents and managers.

In essence, knowledge intelligence increases human capabilities while reducing human exertion.

This report explores the knowledge intelligence revolution. It details where conventional knowledge management is going wrong, before detailing best practices for achieving an intelligent approach to knowledge—and the lucrative rewards that come with it.
WHERE KNOWLEDGE MANAGEMENT WENT WRONG

The logic is sound, the intention is pure, and the concept is sensible.
Knowledge management should be the pathway to a successful customer contact function. It should represent the means through which live agents and self-service platforms gather the insight they need to meaningfully (and efficiently) connect with customers.

The theoretical, as customer contact professionals know all too well, unfortunately does not always manifest as the practical.
Within many organizations, knowledge management actually undermines the aforementioned goals. Rather than empowering agents to perform, it all but guarantees they cannot successfully connect with customers. It also hinges on high-effort, low-value workflows that are the enemy of productivity (and profitability).

Due to four key challenges, traditional knowledge management prevents organizations from successfully competing on the customer experience.

Taxing Upkeep

Traditional knowledge management systems add complexity and inefficiency to the operation.
They require humans to manually add, categorize and manage knowledge entries. This cumbersome task often involves scouring through disparate sources of information about the organization and customers and then creating content in accordance with the strict standards of the knowledge management system.
This taxing form of upkeep also requires employees to manually update knowledge repositories. Not simply tedious, this endeavor can be extremely difficult given that the employees rarely have useful intelligence about which knowledge requires updating, reclassification or deletion.

Worse, knowledge management maintenance often commands a low position on the customer contact hierarchy. Employees prioritize other tasks, allowing knowledge management issues to linger—and continuously weaken the customer experience.

"Traditionally, the Achilles Heel of KM was the time-consuming, maintenance tasks that an analyst or manager needed to perform to keep the system up-to-date and accurate,” says Sedarius Perrotta of Shelf. “They often needed to perform these tasks along with a multitude of other time sensitive activities that had a higher priority."

Poor Findability

A knowledge management tool is worthless if it does not actually help agents, managers and customers access and leverage knowledge.

By that standard, the typical knowledge management system is worthless. Thanks to human error and delay associated with the upkeep, poor classification and search functionality, and no ability to adapt based on performance and behavior, knowledge management tools are often very difficult for agents to use. These frontline employees cannot intuitively, let alone quickly, locate the information they need where and when they need it.

Clearly problematic in live agent interactions, this issue is even more debilitating to self-service platforms. Whereas an agent can theoretically improvise or ask peers for assistance when the knowledge base comes up short, a self-service solution does not have that luxury. If it does not have seamless access to relevant knowledge, it simply cannot help customers solve problems. These frustrated customers will abandon the channel, if not their relationship with the business."
Poor Measurability

Due to flaws in strategy and technology, conventional knowledge management does not offer the necessary degree of measurability.

When setting the strategy, organizations rarely establish clear, relevant metrics and objectives for their knowledge management program. They neither evaluate the quality and usability of the knowledge nor the overall impact on the customer experience and business.

Granted, even those who do approach knowledge management with a mind for ROI face a problem. Few conventional knowledge management systems provide granular, actionable insight into their day-to-day performance. They do not report on which terms agents most frequently search, which areas give agents the greatest area of difficulty, which pieces of knowledge require updates and which forms of knowledge correlate to positive or negative customer experiences. Without this insight, the organization cannot optimize its knowledge management platform. It cannot improve its chances of generating a favorable ROI.

“In the traditional knowledge management environment, no one could answer questions as to what content was the most important, where users were losing time, who were the best performers, or whether the overall system was helping or hurting performance,” adds Perrotta. “The lack of ROI and clear metrics have lead to the failure of many KM initiatives in the past.”
Fragmented Knowledge

A problem throughout the contact center, fragmentation between systems proves particularly problematic for knowledge management.

By forcing employees to search through numerous, often conflicting sources of information, silos greatly complicate the knowledge curation task. They increase the difficulty of an already burdensome, frustrating process.

By causing organizations to store (and thus manage) data in different places, silos also inhibit agent performance during interactions. Agents do not have consistent access to the most up-to-date information, which in turn prevents them from accurately and effectively communicating with customers.

Silos also prevent systems, agents and customers from properly accessing the centralized knowledge base from all individual channels and touchpoints. If the organization’s chatbot, IVR, phone support team, live chat group, and social media managers do not have seamless access to the same information, the notion of delivering a consistent, frictionless experience becomes an impossibility.

“Another major challenge has been building flat, unintelligent silos of knowledge in the CX function for training, agents, and customers,” details Perrotta. “These have taken the shape of content repositories, knowledge bases and self service portals. Having three, four or more sources of truth makes it very difficult to execute a clear and consistent communication strategy with customers.”

Collectively, the conventional approach to knowledge management carries several negative ramifications for the contact center:

- Agents cannot quickly find the knowledge for which they are looking
- High maintenance and upkeep costs
- High costs devoted to training and accommodating human “knowledge workers”
- Agents have to ask peers or supervisors for assistance on a frequent basis
- Agents and systems communicate inaccurate information
- Longer handle times
- Higher escalation rates
- Lower first contact resolution
- Lower customer satisfaction
INTRODUCING “KNOWLEDGE INTELLIGENCE”

According to CCW Digital’s Market Study on the Future of the Contact Center, knowledge management represents the #2 strategic priority for 2019. Organizations clearly understand the costs of conventional knowledge management. They also understand the value of a revamped, more intelligent approach to managing and communicating knowledge within the business.

The “knowledge intelligence” approach transforms knowledge management from a source of inefficiency into a source of customer centricity. It helps the organization and its employees successfully (and more quickly) leverage internal knowledge to connect with customers.

“\n
The disruption to knowledge management transfers many of the tasks and opens up the black box of KM activity to technology which can provide transparency and significantly reduce administrative overhead and exponentially increases the effectiveness of a small number of people to improve the flow of knowledge in the CX department,” explains Perrotta. “Thus it can be said that traditional knowledge management is becoming obsolete and the age of knowledge intelligence is upon us.

There are several fundamental tenets to “knowledge intelligence”
Technology And Automation Play The Right Part

Conventional knowledge management involves a backward approach to the human-technology balance. Employees devote time and energy on upkeep, maintenance and management. They also tailor content to the requirements and specifications of the knowledge management tool.

Knowledge intelligence remedies this situation. Automation technology handles the rote, mechanical tasks like locating content, reconciling information, and creating, updating and categorizing knowledge entries. The technology is, moreover, designed to provide an agent-centric experience. The system is intuitive to use and presents knowledge in a relevant, highly actionable form.

The Human Workforce Plays The Right Part

With technology handling the mechanical tasks, human “knowledge workers” can adopt a more strategic role. They can focus on setting the right metrics, reviewing performance data, and optimizing how the organization creates and leverages internal knowledge.

Agents, meanwhile, spend less time searching through disparate, unintuitive, out-of-date repositories and more time using the knowledge to improve customer engagement.
Real-Time Measurement And Assessment

Knowledge intelligence is not a haphazard, shortsighted endeavor. It involves a clear, comprehensive vision for the role knowledge will play within the customer contact function—and business at large.

"We love talking about artificial intelligence and machine learning and all the great things that we can do with combining all this data together and yet, how many organizations have a true centralized knowledge process that they can be proud of, which is the backbone and foundation of any artificial intelligence program," wonders Nate Brown of UL EHS Sustainability.

With a clear vision and centralized process, organizations can readily assess the impact of their knowledge management strategy. They always know whether the initiatives and solutions they are implementing are truly generating a return on investment.

Knowledge intelligence also requires a real-time, granular look at the health of the knowledge management solution. The organization always has clear insight into how well agents are using the knowledge management platform, as well as which pieces of knowledge are helping or hurting the customer experience operation.
Unification Across Systems And Touch Points

Knowledge intelligence is incompatible with systemic fragmentation and organizational silos. It hinges on unification across all systems and touch points.

Rather than allowing organizational knowledge to sit in separate, isolated repositories, knowledge intelligence mandates a single source of truth. Regardless of where they sit within the organization or how they specifically access this knowledge, employees will always have the most accurate, most timely information. There will be no risk of them reaching a dead-end—or receiving the wrong information.
AI-Driven Improvement

Artificial intelligence plays a pivotal role in the transformation from “knowledge management” to “knowledge intelligence.”

AI-driven platforms *learn* as users engage with the knowledge base. They are able to uncover trends in how users search for knowledge, which content may be incorrect or out of date, and which processes are inefficient. Administrators can leverage this intelligence to optimize their knowledge strategies.

Progressive solutions will actually *automate* the optimization. They will make (or request) updates to existing knowledge, improve search and classification, recommend solutions based on context, and provide guidance to low-performing users.

> With insight from AI, an admin is given a new level of intelligence and understanding of their content repository enabling optimization and iteration where previously it was not possible,” says Perrotta. “Additionally, with automated maintenance suggesting constant fixes to the content repository the old problem of content going out of date, losing trust and the kbase becoming stale is a thing of the past.

Knowledge Is A Means, Not An End

An intelligent organization does not purchase a knowledge management tool for the sake of getting a knowledge management tool. It optimizes knowledge management to achieve a clear, meaningful objective.

With that high-level objective in place, the organization knows how to build and tailor its knowledge management processes. It considers when, why and how particular agents or employees will seek knowledge, and it ensures the data they access is contextually relevant.

With a sense of purpose, the organization can also identify how the quality of knowledge management tools and processes correlate to overarching performance goals.
**Better Agent Experience**

An intelligent, agile, unified knowledge management program will help agents perform better. They will spend less time searching for knowledge, and more time using the knowledge to connect with customers.

Not simply a way to boost *performance*, knowledge intelligence also creates a better agent experience. Searching through slow, disconnected, unintuitive systems is a major source of agent frustration; knowledge intelligence eliminates this pain point.

A key tenet of knowledge intelligence, therefore, is leveraging the voice of the agent to drive the technologies and processes.

“One of the things that I think has been very successful for us is that we take a team of these representatives and they’re involved in the [solution] pilot right up front,” shares Kelly Kurtzman of Verizon. “We like to say [our technology] is built for reps by reps.”
The “knowledge intelligence” approach remedies the debilitating pain points associated with conventional knowledge management. It distances humans from the “maintenance” part of the process, allowing them to focus on what they do best: devising knowledge strategies and leveraging knowledge to make intelligent business and customer contact decisions.

Advances in artificial intelligence technology make “knowledge intelligence” feasible, but it will take more than purchasing a modern knowledge management tool to achieve the transition. There is a wide gradient of technology out there, and only a select few solutions truly meet the new standard for knowledge management.

Even then, the technology represents only one piece of a much bigger puzzle. The journey to knowledge intelligence also requires support from people, process and operational strategy.

**Make Knowledge A Strategy**

Before determining what tools and process to implement, organizations will need to answer questions of why and how. Why is knowledge management important to the organization? How will an organization attain and operationalize the relevant knowledge?

With a strategic framework in place, the organization can begin to explore tactical issues like how it will make appropriate use of existing knowledge and data, how it will create content to close gaps within the knowledge base, how it will update and optimize content over time, and how it will make knowledge “usable” to key stakeholders.
Knowledge management or more appropriately, knowledge intelligence, is a 7-10 year strategic decision that has a massive impact on the department and the entire organization if done properly,” advises Perrotta.

**Involve All Key Stakeholders**

Whether formulating knowledge strategy or fine-tuning the execution, it is imperative to include all relevant stakeholders.

Strategic leaders from all departments will play a valuable role in identifying the needs and establishing the goals associated with the knowledge endeavor. Customers, agents and supervisors will meanwhile help define the needs of the end-user knowledge platform.

They will also require training and education on effectively using any knowledge tools.

**Adopt An Intelligent Knowledge Solution**

Technology is not the only requirement for knowledge intelligence, but it is an important one. Without the right system, the organization cannot achieve the appropriate balance between technology and humanity. It, accordingly, cannot elevate its approach to knowledge management.

An intelligence knowledge solution features several crucial capabilities, all of which help organizations of conventional knowledge management.
**Powerful Search Engine:** A great search tool empowers agents to intuitive locate specific pieces of content within files. It also leverages AI to “guide” users to the right data.

**User-Friendly Interface:** Using a knowledge management tool should never feel like a burden. The best platforms boast simple, quick, intuitive interfaces.

**User Design and Permissions:** Numerous stakeholders—from leaders, to supervisors, to agents, to customers—will be accessing the knowledge base; an intelligent tool helps the organization tailor the content (and accessibility rules) to each individual user type.

**Robust AI and Automation:** Great tools leverage AI and automation for at least three purposes: intelligently directing agents to relevant information, adapting based on usability data, and meaningfully assisting leaders in making updates and revisions.

**Easy Authoring and Publishing:** In the event that content creation or updating cannot be automated, the right knowledge management tool makes it easy for leaders to develop, publish and share content in a variety of media types.

**Analytics:** Knowledge intelligence requires a robust look at the user experience within the knowledge management tool, as well as the impact the tool is having on the overall business. Robust reporting is therefore a crucial requirement.

**Channel and Platform Integration:** Knowledge intelligence requires a single source of truth. This requirement is only attainable when the knowledge management platform seamlessly integrates with all enterprise systems, databases and contact channels.
Seek Guidance From A Knowledge Expert

A great knowledge platform will be intuitive and powerful right out of the box.

Its fitness for knowledge intelligence is about far more than day-to-day usability, however. Knowledge intelligence asks organizations to calibrate all tools and technologies toward their overall objectives. From minor tweaks to new investments, every tactical and strategic decision requires astute, seasoned thinking.

It requires guidance from a knowledge expert who knows how to devise and update a knowledge strategy, successfully implement a knowledge tool, measure performance and impact, and refine the strategy over time.

Assess Performance Using A Three-Tiered Approach

Using the aforementioned technology requirements, an organization can zero-in on the best possible knowledge management technologies.

Purchasing the right tool does not, however, create assurance that the tool will make the appropriate impact. The journey to knowledge intelligence requires the organization to measure and optimize performance against three crucial criteria:

Content Quality:
Key considerations include insights into the most popular content over time, details on how long (and successfully) users are engaging with content items, data on which content is becoming out-of-date, notes on the accuracy of the search engine and content categorization and metrics on overall usage patterns.

Usability:
Important considerations include data on overall user behavior, commentary on the best and worst-performing users, opportunities for user training, examples of common “pain points,” and patterns in the types of content users prefer to create and/or access.

Organizational Impact:
Valuable considerations include weekly and monthly reports on usage during customer interactions, data on how much “handle time” is devoted to searching the knowledge base, trends regarding contact center metrics like FCR, escalation rate and CSAT, and insights on the overall business impact.
Insofar as they routinely see the inefficiencies of upkeep, the impact of inconsistent or conflicting knowledge, the harms of outdated information, and the consequences of high agent effort, an operationally minded leader will obviously see the value in knowledge intelligence.

The real beauty of the knowledge revolution, however, is the impact on the customer experience. Knowledge intelligence is not merely an efficiency play; it drives customer centricty.

With customers increasingly turning to self-service, a more intelligent knowledge framework will ensure they can intuitively and successfully address meaningful issues on their own.

When they do seek support from a live agent, that team member will be able to leverage the more robust knowledge platform to share accurate, relevant, digestible information in a quick, omnichannel manner.

Knowledge intelligence is good for the customer and for the business.
MEET THE AUTHOR

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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital’s series of reports. CCW Digital’s articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.
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