Critical success factors of knowledge management pdf

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Delivering high-quality customer service and support is often a challenge when your products are complex and when there are ongoing changes in the general environment. With BMC Helix Knowledge Management by ComAround, the Customer Care Center at Volvo Car Sweden always has access to the latest, most accurate information and knowledge and has improved customer experience and satisfaction by getting answers to customers faster. Volvo Car Sweden is seeing a clear trend for improved customer satisfaction [Net Promoter Score (NPS) and Customer Satisfaction Index (CSI)] and an increased problem resolution rate. Onboarding new employees in the Volvo Customer Care team is also easier and faster with the ready availability of all the relevant and up-to-date knowledge. Niklas Byvik is Product Manager, Accessories – Communication & Education Specialist at the Customer Care Center at Volvo Cars. He lists four factors for establishing a successful knowledge management initiative. 1. Use specialized knowledge management software If your customer care center has difficulty answering questions in a timely way, then you need specialized knowledge management software. This has helped Volvo Car achieve its goals of following the customer journey and increasing customer satisfaction. Agents will get more work done because they will have more time to help customers and influence the excellence of the brand and service experience. “We’ve been able to respond to customers quickly, and everyone now has access to the same information at the same time,” says Pia Johansson, Senior Manager Customer Care Center at Volvo Car Sweden. 2. Establish processes and routines Knowledge management is complex. You need processes and routines in order to work on a large scale and to have up-to-date, relevant knowledge. Otherwise, you risk having knowledge that is unusable and unfindable. Use an established knowledge management methodology, get assistance from knowledge management experts, and get agents involved when you’re creating the processes and standards for knowledge creation. 3. Agree on a common goal and intended benefits You need a tight team to be successful. Clarify the purpose and benefits of knowledge management. Agree on a common goal that measures the effects on end customers. Work becomes more fun and your customers are happier. 4. Have a customer-centric mindset When handling knowledge in the knowledge base, your focus should always be on helping customers. Always have the customer in mind when writing knowledge articles, so that the articles will be findable and relevant to the people you are serving. “BMC Helix Knowledge Management by ComAround has helped us to improve customer satisfaction. They are the key to success and continuing our journey in a positive direction,” says Niklas Byvik, Product Manager, Accessories – Communication & Education Specialist in the Customer Care Center at Volvo Car Sweden.” Prepare for tomorrow with knowledge management Analysts and industry experts agree that an established knowledge management process and foundation is critical to the success of a knowledge management initiative. Seek out a knowledge management solution that not only supports the way you work today, but that is prepared for the needs of tomorrow as well. To learn more, visit the web pages for BMC Helix Knowledge Management and BMC Helix Digital Workplace. These postings are my own and do not necessarily represent BMC's position, strategies, or opinion. See an error or have a suggestion? Please let us know by emailing blogs@bmc.com. It’s estimated that organizations spend anywhere from 3 percent to 7 percent of their revenue on technology. If technology is not implemented correctly or if you don’t adequately prepare your employees for change, it can be a huge drain on your company. It can cost you millions of dollars as a direct result of loss of productivity, and that’s not to mention the technology spend itself. The truth is that this happens more than you might realize, and knowledge management platforms are no exception–which is why it’s so important to focus on the factors of successful knowledge management implementation.. Organizations invest in knowledge management platforms so that employees, whether it’s across an entire organization or within departments, can find and share the information they need to do their jobs. Successfully implementing a knowledge management system requires a great deal of preparation, patience, and a willingness to learn. That’s why we’ve put together 14 tips to help you implement your knowledge management platform. Before you know it, your employees will be sharing and collaborating like you’ve never seen before. 1. Define Your Goals and Objectives The first step with any technology implementation is to define your goals and objectives. While this might seem obvious, this is probably one of the biggest reasons why implementations fail. When you define your goals and objectives, you need to take into consideration each group who will be affected. Meet with each of the department heads and other company leaders to discuss and clearly define the goals and objectives for your knowledge management solution. Setting your goals early will also help you determine how you’ll measure performance and define success. The more specific you are, the easier it will be to track your progress. “Think about the specific business goals you are hoping to achieve, and which metrics you’ll track to determine whether or not you achieve those goals. It’s important that you set yourself up to measure ROI down the road.” -Emma Galdo, Director of Customer Success, Bloomfire 2. Identify and Articulate Your Motives Second to defining your goals and objectives is transparency. This step is critical—especially considering one in three projects fail due to poor stakeholder engagement, according to research conducted by the Project Management Institute. So, once your goals and objectives are established, communicate this information back to the team so no one is left in the dark. Everyone should understand the purpose of the change, how it can benefit them, and their responsibilities in ensuring the implementation is a success. Take time to illustrate exactly how the new platform will improve their day-to-day. By making it more personal, they’ll be more inclined to push through the learning curve. “If nothing else, defining and communicating your goals with the platform helps end-users to distinguish it from the other ten platforms your organization uses. I see many companies that have what I call ‘new software fatigue.’ The best way to cure software fatigue is to communicate the specific purpose of your knowledge engagement platform clearly and often.” -Betsy Anderson, Senior Implementation Project Manager, Bloomfire Don’t be afraid to address some of the knowledge management challenges your organization faces right off the bat. Explain the productivity and monetary losses that happen when your customer service team can’t find the information they need to help customers, when your sales team takes too long to onboard new reps, or what happens when marketing notices a lack of consistent branding. Help them see the pain of not using the platform compared to the massive benefits the entire company will experience when the solution is fully implemented. 3. Outline Technology Needs Once you have a clear understanding (and documentation) of your motives, objectives, and goals, it’s time to outline your technology needs. Identifying the non-negotiable things that your knowledge management platform needs to do will help you come up with a shortlist of solutions that may meet your needs. For example, if you know you’re going to be publishing a lot of training videos to the platform and want employees to be able to jump to specific points in the video where a keyword is spoken, then you should focus on solutions that have this capability. As you evaluate knowledge management systems, make sure you’re focusing on the big picture problems you’re trying to solve, and when you meet with different vendors, make sure they can clearly demonstrate how their solution solves these problems. 4. Develop a Change Management Strategy Even though you’ve established your goals and objectives, it’s imperative to understand that change doesn’t happen overnight. This is why it’s important to recognize and develop a strategy and tactics for continuous change management. “To a certain extent, it doesn’t matter how good your software is if you don’t have a solid plan for adoption. Change management is the human side of process improvement. You can’t have one without the other.” -Betsy Anderson, Senior Implementation Project Manager We recommend providing updates on engagement metrics and other KPIs during department or company meetings. And don’t stop after your implementation—make sure to keep the platform top of mind post-launch by mentioning it frequently and reminding others of the benefits. These not-so-subtle hints will make the transition more comfortable for your employees and can have a huge impact on their overall engagement and success of the program. In other words, you need to normalize the new platform and help all teams recognize the value it’s bringing to the organization in real-time. Change is always hard, but the more you loop the new solution into everyday conversations, the more comfortable employees will feel using it, asking questions to improve their understanding, and evangelizing it to others. 5. Identify and Recruit Internal Champions Employees will most likely use your knowledge management platform if they see their peers having success with it. This is why it’s important to identify one or multiple members of your organization to be your internal champions. These individuals are driven, upbeat, and eager to drive organizational change. Your internal champions will play an important role in generating excitement around the launch of your knowledge management platform and also have a role in the soft launch (we will discuss this more in a little bit). Of course, not everyone will be thrilled from the get-go, and it’s important to seriously consider the concerns and feedback of those who are more resistant to change. “Resist the urge to get feedback only from the folks who are excited about the new initiative,” she says. “Early naysayers and critics can provide some of your most valuable feedback throughout the implementation process. And once you’ve converted them, they’ll be your best advocates.” -Betsy Anderson, Senior Implementation Project Manager Allow everyone an opportunity to be heard. If people are unhappy or frustrated, take time to understand exactly what’s bothering them and identify ways to overcome those obstacles. By showing you value their opinion and involving them in ironing out the kinks, they’ll be more likely to engage with the platform more going forward. Also, keep in mind that although only a few employees may be willing to speak up, if one person is having challenges, others are likely experiencing the same difficulties (but just doing so in silence). 6. Establish High-Level Processes Hopefully you’re launching a knowledge management platform that is easy to use and requires minimal training. However, even with an intuitive system, it can still be valuable to document some basic processes for platform usage, especially for employees who may be new to knowledge documentation. For example, you might introduce a content review process where subject matter experts write a post draft in your knowledge management platform and designated moderators review and approve (or provide feedback and request revisions) within a specified time frame. Or you might develop templates to guide contributors who are creating certain types of standardized content. Keep in mind that the processes you establish before you implement your knowledge management platform may evolve over time–and that’s okay. Rather than being rigid in your implementation, embrace the fact that you can learn from the ways people end up using the platform and optimize your processes over time. 7. Inventory and Organize Your Knowledge Assets Even if your knowledge management platform has AI-driven search, establishing a knowledge hierarchy can help new users browse and discover new content and can aid in curation down the road. Take the time and really think about a knowledge structure that makes sense for your organization. Gather feedback from team leaders and then work with your knowledge management platform provider to learn how other customers have structured their information and why it works for them. “During this step, I always recommend that you ‘Marie Kondo’ your content. Select only the most relevant and recent information to migrate into the community. Outdated research, obsolete policies, and peripheral documents will clutter your community and make it difficult for users to find the most current and up-to-date knowledge.” -Emma Galdo, Director of Customer Success By making the process of using the platform as easy and streamlined as possible from day one, you can reduce friction and immediately foster better engagement. 8. Build a Knowledge Management Implementation Roadmap Stay on track as you prepare to roll out a new knowledge management system by developing an implementation roadmap. Your roadmap will help you establish a schedule for specific activities (e.g., beta testing, internal communications, your official launch) so that the project continues moving forward and everyone involved in the implementation has a clear sense of deadlines and responsibilities. As you develop your roadmap, ask yourself the following questions: Are there any factors that require us to launch by a certain date (e.g., a need to launch ahead of a busy holiday season)? Are there certain teams or individuals who will use the platform ahead of the official launch (e.g., beta testers)? Who needs to be involved (and who will own specific activities) at each point on the roadmap? When should we start communicating about our new knowledge management initiative? How many communication touchpoints should there be (and what should they be)? What do we want our training schedule to look like? 9. Hold a Soft Launch or Beta Test The best way to work through all of the potential kinks in your knowledge structure is to gather the internal champions you previously identified and hold a soft launch. Start off your soft launch with a quick training surrounding best practices on how to use the platform. This is also a good time to reiterate the goals and objectives. It’s recommended you let your internal champions (and a few tough critics) use the platform for about two weeks as a test period, but any amount of early assessment will help. “Whether your soft launch is a full-blown beta test with a User Acceptance Testing assignment or a one-hour meeting where future users can play around with the new tool, this is a great opportunity to gather and address initial feedback. It’s important to get ahead of any potential friction points before you officially launch.” -Emma Galdo, Director of Customer Success 10. Listen and Respond Proactively to Feedback After the soft launch period is over, meet with your internal champions and critics and gather as much feedback as possible. Ask them to relay the good, the bad, and the ugly. Remember, these individuals will most likely be using the platform on a daily basis, and all feedback is warranted. Strategize ways to fix the issues that might have come up during the soft launch to ensure a successful rollout to the rest of the company. When everything is all said and done, thank your internal champions for their participation with a gift or lunch. Then, as you move forward, keep the lines of communication open and consistently ask for more feedback to further optimize the user experience. “Make sure all end-users have a consistent way to share feedback, either in real time with an on-demand form, or by sending biannual surveys. This will not only help you improve the platform as the needs of the organization evolve, but it will also allow you to build trust with your user base.” -Emma Galdo, Director of Customer Success 11. Link Knowledge to Your Employees When an employee has a question, there is often a chain of people they have to go through to find the knowledge expert. To reduce the amount of time it takes your employees to find the knowledge expert, consider setting up a knowledge directory as a bookmarked post within your platform. This directory identifies your subject matter experts (SMEs) in various areas, saving your employees time when it comes to searching for the knowledge they need to do their jobs. The easier it is for your employees to access the information they need, the better the experience for everyone involved. 12. Get the Leadership Team Involved Right from the get-go, your organization’s executive team should play a visible role in your knowledge management platform launch effort. They should articulate the goals and objectives, play a role in the soft launch, and be active on the platform. Consider having your executive make the first post in your platform, welcoming everyone and outlining the goals. “When you see an email from the CEO in your inbox, there’s no way you aren’t opening it. Executive sponsorship is a really powerful tool to engage users during your launch and beyond.” -Emma Galdo, Director of Customer Success Active participation from the leadership team will show how serious they are about creating change, and this will be a direct reflection of how seriously your employees will take this change. (We’ve even had customers’ executives post self-recorded videos, which is a sure-fire way to drive engagement.) 13. Conduct a Contest Who doesn’t love a little friendly competition? To get your team excited about the new knowledge management platform, hold a contest to encourage your employees to really dive in and get the lay of the land. (Some of our customers have had success with virtual scavenger hunts or bingo games inside their knowledge management platform and contests to choose a name for the new KM community.) The prize can be lunch with leadership, a cool new tech gadget, paid time off, or whatever is appropriate for your organization. 11. Support Continuous Training Don’t let the hype of your new knowledge management platform die. Hold regular training meetings for your employees so they can stay on top best practices, as well as any important product updates or changes. This is one of the best ways to keep employees engaged and sharing company knowledge effectively. “Any significant update to the platform is an opportunity for training and engagement. Whenever you hear from your Customer Success Manager about a new feature, take that as your cue to send out communication and help documentation.” -Betsy Anderson, Senior Implementation Project Manager Bonus Tip: Choose a Platform that Offers Implementation Project Management Services One of the best ways to ensure success is by working with a knowledge management partner that offers implementation project management as a service. Because these professionals are experienced in helping organizations roll out their solutions, they’ll be able to offer guidance on overcoming common challenges and maximizing the success of the platform. Additionally, they’ve likely codified and perfected the implementation process over time. For example, at Bloomfire, our expert implementation project managers have developed a four-stage enterprise ignition service covering planning, configuring the platform, seeding content, and launching to end-users. Our team assists customers from establishing goals all the way through to managing a post-launch survey to ensure you’re prepared for long-term success. Change in the workplace, no matter if it’s big or small, is never easy. However, if you follow these steps when implementing your knowledge management solution, the investment you made will pay off. Happy knowledge sharing! This post was originally published on May 13, 2015. It was most recently updated and expanded on July 13, 2022 to incorporate current best practices from Bloomfire’s Customer Success team.

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