

Practical approach to Knowledge Management



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Agenda

- Knowledge Management Evolution
- KM Best Practices
- Tips for Effective Knowledge Management
- Questions ?

Knowledge Management and ITILv2

- Known Error Database
- Knowledge Data-base ??
- ITIL does define a knowledge-base and when to use it
 - Incident Management uses the knowledge (known error) data base as the incident lifecycle
 - Problem Management is responsible for the content
- Two processes in Problem Management
 - Problem Control
 - Error Control

Knowledge Management in the Service Desk

- Self-Service for customers/end users (IM and PM)
- Very popular, but not successful
- Limited by search and retrieval technologies
- Good step towards knowledge gathering

Knowledge Management Best Practices

- ...before good practice in ITILv3 ☺
- Centralized Knowledge Management Approach
- Knowledge Centered Support (KCS)

Centralized Knowledge Management Approach

- Knowledge creation, quality and accuracy is handled by dedicated KM team
- Common companies CAN'T afford it
- Role is often shared and content is “biased” towards shared expertise
- Knowledge developer in shared setup will limit KM with other duties
- Level of quality control is high

Knowledge Centered Support (...and derivatives)

- A decentralized approach to content creation, maintenance and control
- An emphasis on participation, rather than control
- Simplified workflow to minimize the process footprint

Knowledge Centered Support

- Knowledge Management part of “support job profile”
- Content creation is day to day job
- Content control and quality assurance is distributed
- Requires “culture change”
- It can contain less accurate information

ITILv3 Knowledge Management

- The goal is to improve decision making process
- Scope is the Service Lifecycle (not only IM, PM)
- SKMS (CMDB – CMS – SKMS)
 - The experience and the skills of the staff
 - User and organization behavior and performance
 - Expectations and requirements from partners and suppliers

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Tip #1

Identify the Recurring Requests

- Ask the front-line folks
- Ask your customers
- Pull reports from your systems
- Cross-reference and correlate
- Determine the top 10-20
 - Don't Boil the Ocean!

Tip #2 Automate

- Can anything be Automated?
 - Forgot my Account Name/ID
 - Forgot my Password, please reset
 - Need access to the Aardvark2000 system
 - The above **still** account for over 60% of calls! (Gartner, Forrester, HDI, personal experience)
- Use the tools you have!
 - Don't buy anything new
 - Review/Create processes/workflows

Tip #3 Negotiate

- If it can't be Automated, can it be Negotiated?
 - Example: New Password Policy
 - Change every 30 Calendar Days
 - 8 Character Minimum
 - Upper Case, Lower Case, Number, Special Character
 - Cannot reuse last 5 Passwords
 - At day 16, “nagger” appeared
 - Results
 - Immediate increase in number of calls
 - Front-Line Operators overwhelmed
 - Reduced productivity

Tip #3 Negotiate

- Negotiated Outcome
 - ✓ Change every 90 Calendar Days (up from 30)
 - ✗ 8 Character Minimum (no change)
 - ✓ At least one Letter, not case-sensitive (removed upper case requirement)
 - ❖ At least one Number and one Special Character (no change)
 - ❖ Cannot reuse last 5 Passwords (no change)
 - ✓ At day 74, “nagger” appeared (up from 16)
- Results
 - Dramatic reduction of calls
 - Creation of an “Unlock Your Domain Account” internal web page

Harvested the Low-Hanging Fruit

- Automation
- Negotiation
- Iteration

- Next Step... Content Creation

Tip #4 Pre-Preparation

- Remember Tip #1
 - Identify the (Remaining) Recurring Requests
 - Don't Boil the Ocean!
- Identify the Knowledge Consumers
- Define Knowledge Management Roles
- Create Templates/Style Guide
- Create Category Structure
- Define Knowledge Lifecycle Workflow

Tip #5 (Prepare) Identify the Knowledge Consumers

- Who is your Target Audience?
 - Analysts
 - Employees
 - Customers
 - Vendors
 - One, Many, or All of the above?
- How will Knowledge be used?
 - Resolve Service Desk Tickets (Analysts)
 - Self-Service (Employees, Customers, Vendors)
 - General Corporate Knowledge (All)

Tip #6 (Prepare) Knowledge Management Roles

Who is Responsible for:

- Creating/Submitting
- Reviewing
- Publishing
- Managing
- Updating
- Retiring

Example Roles:

- Initiator
- Assignee
- Author
- Owner
- Contributor
- Subject Matter Expert
- Knowledge Analyst
- Knowledge Manager

Keep It Simple!

Tip #7 (Prepare) Knowledge Template — Look & Feel

- What should be the format of knowledge content?
- Should different types of knowledge look different?
- Define & Use Document Templates
 - Font, Font Style, Font Size, etc.
 - Use of Logos, Icons, Screen-Shots, Multi-Media
 - Typical template areas: Title, Summary, Problem, Resolution
 - Consistency!

Keep It Simple!

Tip #8 (Prepare) Knowledge Categorization

- How will content be organized?
 - Hierarchical Structure
 - Decision Trees
- How will content be secured?
 - Category
 - Role
- How will consumers find content?
 - Keyword Search
 - Natural Language Search
 - Authority vs. Popularity

Keep It Simple!

Tip #9 (Prepare) Knowledge Workflow and Lifecycle

- How is content Created, Reviewed, Published, Updated, Retired?
- Define Approval Policy and Roles
- Establish procedure for Normal and “Hot” Knowledge
- Define Review and Publishing Policy
- Define Review, Expiration, and Retirement Process
- Establish process for identifying and fixing problems with content

Keep It Simple!

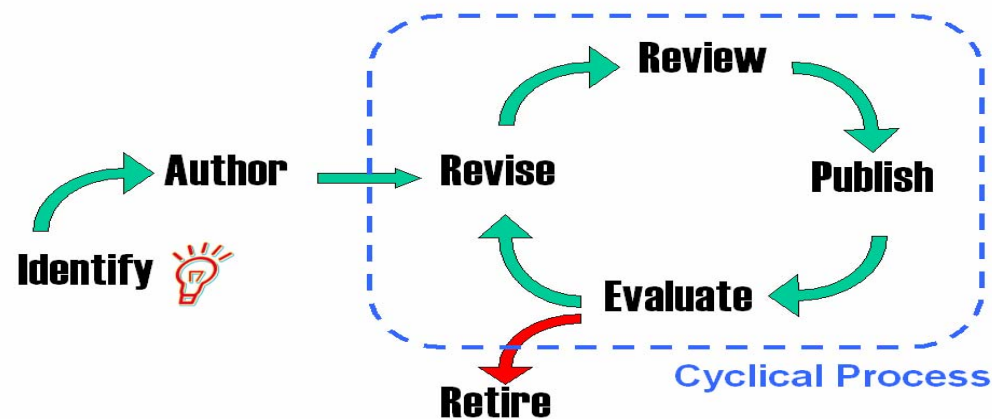
Tip #10

The Knowledge Management Process

- Next Steps
 - Define Metrics and Reporting
 - Beware “false” metrics!
 - Create small subset of content
 - Don’t Boil the Ocean!
 - Quality not Quantity
 - Test with small diverse group of consumers
 - Update processes as necessary
 - Influence culture change
 - How do you get end users to stop calling you?

Tip #10 The Knowledge Management Process

- Post-Rollout
 - Constantly review documents
 - Evaluate metrics
 - Continue to influence culture
 - Knowledge Management is never finished
 - an ongoing and cyclical process



Tip #11

Lack of knowledge vs. too much

- Lack of knowledge = end users will not use it
- Too much - confusing, maybe duplicate entries
- Increase quality control / define proper scope
- Support staff should check SKMS before they enter new record
- Define periodical review of content per area

Tip #12

Mentally held knowledge

- The biggest asset of company
- Lost completely with person leaving

- Lack of individual value
- Time constraints
- Lack of confidence

- INCENTIVES and POSITIVE MOTIVATION

Tip #13

Electronically held knowledge

- Select proper sources and repositories
- Index them and organize
- Provide powerful search options
- Define aging and accessibility of documents

Questions ?