Getting Started with Knowledge Management

Implement an effective Knowledge Management process in your organization

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Knowledge Management empowers businesses and users with a repository of readily available solutions and eliminates the need to reinvent the wheel. Knowledge Management is much more than an ITIL process, and it demands a cultural change to adopt and adapt the Knowledge Management process for every function. It is not just for your IT teams whereas its benefits span across multiple business functions. This is a huge opportunity for organizations to improve ticket resolution time, reduce cost and improve overall value with an effective Knowledge Management. This was added as a separate process that supports other ITSM processes in ITIL v3. The primary objectives of Knowledge Management are as follows:

- Share information with relevant users
- Optimize resources by sharing already available knowledge
- Distribute knowledge to the right users at the right time and make it accessible

In this guide, let us learn about Knowledge Management basics, its relationships within ITIL service lifecycle, implementation steps and benefits.

What is Knowledge Management

"Knowledge Management is the process of creating, using, sharing and maintaining organizational knowledge so that business users can use whenever needed."

This is a part of service transition within the ITIL Service Lifecycle. ITIL Knowledge Management receives inputs from other ITIL processes and knowledge is consumed across the organization to resolve issues faster and empower users. Knowledge Management improves collaboration among multiple teams, but this process is underutilized as companies create wealth but fail in the distribution aspect. Knowledge has to be captured, organized and shared in a way that is easily consumed. Knowledge-Centered Support (KCS) is a set of best practices for Knowledge Management that recommends the best way to structure knowledge in a suggested framework.

Challenges

- Knowledge exists in silos
- Limited or no knowledge transition
- Ambiguity in knowledge ownership
- Cultural barriers
- Poor training or mentoring programs
- No process in place to store and track knowledge
- Low engagement due to a bad user interface
- No technology backed up Knowledge Management
- Operations constraints limiting people from sharing knowledge
Knowledge Management Process

Data
Data is a collection of unprocessed and discrete data or numbers. Data is unorganized and has no meaning or relevance. It has to be processed to derive purpose and Knowledge Management identifies this data, track and store them to derive useful patterns.

Information
Collection of processed data that derives meaning and helps in decision making. It adds some context to the data and this involves asking questions such as what, when, who and where.

Knowledge
Knowledge is derived from information and it is composed of insights, ideas and judgments that helps in clear decision making. This involves a detailed analysis of information and helps in decision-making. This requires answering “how” questions.

Wisdom
Wisdom is complete understanding and ultimate insight into the data. It is used by the management to take strategic decisions and remain competitive. It requires answering a lot of “why” questions and gaining a deeper understanding of knowledge.
Cultural Transformation

For an effective Knowledge Management, organizational level cultural change is essential. It is not an overnight exercise and has to be driven top-down. Knowledge sharing is not common among every employee and therefore, make it a part of your culture code. Look out for this attitude while recruiting new employees. Knowledge capturing and sharing are two facets of an effective Knowledge Management. It is not just tactical changes but a strategic initiative across the organization to use available knowledge and create new knowledge. Provide relevant rewards to motivate users to contribute to Knowledge Repository. Share success across the organization to develop a global culture.

Capture knowledge at the point of every interaction. IT agents may resolve complex issues during an end-user conversation but may not always be documented. Therefore, prompt at incident response level to add the response to the knowledge base. This has to be seamless and easier for agents to document knowledge. Knowledge Management team can then refine the captured knowledge.

Once knowledge is captured, it is important to define a proper structure and maintain for easier accessibility. This helps in consistency and improves readability, usability, and overall quality. Templates are helpful to bring in a uniform structure. For example, Freshservice follows a three-tier structure such as category, folder, and article to manage knowledge base articles. Images, videos, GIFs format are supported to customize articles.

Proper knowledge distribution eliminates reinventing the wheel. Knowledge base search is a useful functionality to discover the right articles at the right time. Keyword search ensures that relevant articles are suggested for end users automatically at the time of ticket reply. This saves huge resources and avoids searching for a solution that is already available.
Improve

Knowledge base articles are constantly reviewed to remain up to date and latest. End-user feedback is important to improvise the knowledge base. Provide like and dislike options to get feedback about the articles. Access control is important for Knowledge Management. i.e., only relevant users are given permissions to create, edit or delete articles.

Knowledge Management & Service Operations

Knowledge Management & Incident Management

Knowledge Management is heavily used within Incident Management during the resolution process. Knowledge base articles auto-suggestions are available for agents as well as end users. This functionality triggers self-service behavior among end users which in turn reduces trivial tickets to the service desk. As soon as a ticket is received, agent searches the knowledge base for available articles before investing time to troubleshoot. If the solution is not already available, then agents add these articles newly to the knowledge base. KCS recommends a structured approach for incident handling and resolution. This association between Incident and Knowledge Management improves SLA, customer satisfaction and enables faster resolution.

Knowledge Management & Problem Management

Problem Management involves finding the root cause of repeat incidents. This involves analyzing past historical data and pattern. Problem Management leverages Knowledge Management by accessing the central repository and solution database. Knowledge base articles are fundamental to trend analysis and help in proactive Problem Management. Relevant solution articles are associated with the problem record for easier reference. Known error database (KEDB) along with workarounds are stored in the knowledge base as well. After a permanent solution is identified, it is stored in Knowledge Management for future reference. Post Incident reports (PIR) always have the relevant knowledge articles attached.

- Proactive Problem Management - Prevention of future incidents through trends via data analysis and review of PIRs
- Reactive Problem Management - Accurate problem tracking – By linking PIRs together, IT teams can accurately gauge issues
Knowledge Management & Change Management

Change evaluation and risk analysis use existing knowledge base articles to understand from the related changes deployed in the past. Planning and approvals are followed to implement the evaluated change. Once the change is implemented, knowledge base articles are revisited to include any bug fixes or changes in the functionality. Post Implementation Review (PIR) and knowledge base audit check for any revisions or changes. Risk impact assessment is handled properly with the help of a knowledge base.

Knowledge Management & Release Management

Release Management is responsible for deploying the evaluated changes. This involves building and testing codes. While doing this, knowledge base articles are checked to include any release items and several changes. Version control and documentation are an important part of Knowledge Management. New issues are documented post-deployment. Build plan, and test plan are also prepared based on previous knowledge available.

Continuous Service Improvement

CSI focuses on service improvement plans, and it improves service quality. Knowledge Management feedback is crucial to improving articles quality and user satisfaction level. Knowledge articles perform data analysis for recurring incidents and requests. This eliminates major incidents and saves many costs. This analysis is an input for product management and product engineering.

Steps to Implement Knowledge Management

Establish Knowledge Management Program Objectives

Understand the primary objectives of the Knowledge Management system. Provide short-term and long-term vision and the business problem that this would be solving. Management buy-in is important for the success of this program. Create a KM council of people with right skills to devise a strategy, mission, and vision statements. Communicate the vision statement clearly to your target audience.

Prepare for Cultural change

Develop a knowledge-driven culture and Knowledge Management is a cultural transformation beyond process implementation. Knowledge sharing is a behavior that has to be developed gradually. Reward individuals for sharing knowledge across their team members. By doing so, Knowledge Management becomes an integral part of your work culture.
Define High-Level Process

Define a clear process for knowledge capture, maintenance, and distribution. Make it easier for agents/system to capture knowledge with the help of service desk solution. Automatically convert ticket resolution provided by agents as knowledge base articles that are not available already. Self-service is helpful in publishing knowledge base to end users. Knowledge base search indexing improves accuracy and faster retrieval of relevant articles.

Follow an Inclusive lifecycle approach

Integrate Knowledge Management across service lifecycle stages. When it is associated with every stage, it becomes an integral part of the day to day activities. This indirectly results in a mindset change and cultural change. Do not treat KM as a separate tool rather make it inclusive within the process. Every process in each service lifecycle stage leverages Knowledge Management to deliver better results.

Knowledge Management Process flow

Knowledge Management process flow is defined as Knowledge creation, storage, distribution, and application. It is important to focus on each of these stages to realize the value of Knowledge Management. Assign relevant permissions to every service desk member to edit articles based on feedback. Define approval process for articles to be published.

- Create a KM council who are responsible to manage end to end activities
- Identify/map existing content sources, interaction channels (where is knowledge created, where are requests submitted) and primary processes for contributing, accessing and sharing both formal and informal or ad hoc information
- Evaluate existing and available solutions which support the mission of new-age KM, including content management, tagging, search, expertise location, communities and authoring tools, as well as integrated platforms and emerging open source alternatives

Establish a set of metrics and KPIs

Metrics and measurements enable businesses to assess the current state and plan for future state diligently. KPIs and critical success factors help in improving the overall performance and agents’ productivity. Publish these metrics publicly across teams. Create a leaderboard to reward knowledge contributors.

- Number of articles added—per day, week, month
- Knowledge base contributions by support team member
- Number and percentage of solutions reused
- Number and percentage of incidents resolved where a knowledge article was instrumental
- User-satisfaction level with the KM capability
Three spheres of Knowledge Management

Benefits

For Agents
- Better problem solving and knowledge sharing with peers
- Faster ticket resolution
- A single source of truth to search for knowledge
- Improved team interaction and collaboration
- Better motivation to share knowledge

For End users
- Improved end-user satisfaction with better awareness
- Advanced search functionality and faster solution
- Seamless business operations

For business
- Improved overall productivity
- Smooth operations
- A common repository to store knowledge for future reference
- Effective collaboration among remote
- Better decision making from past history
About Freshservice

Freshservice is a cloud-based IT service desk and IT service management (ITSM) solution that is quick to setup and easy to use and manage. Freshservice leverages ITIL best practices to enable IT organizations to focus on what’s most important - exceptional service delivery and customers satisfaction. With its powerfully simple UI, Freshservice can be easily configured to support your unique business requirements and integrated with other critical business and IT systems. Are you trying to keep up with the current ITSM trends? Freshservice is on a constant mission to innovate and deliver great experience.

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