

Knowledge Powers the Service Desk

The time has come to review knowledge management within service delivery

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Executive Summary

Knowledge management (KM) has enjoyed something of a chequered history in the corporate arena, with many early implementations failing to live up to full expectations. This is perhaps unsurprising given the high hopes for KM and the practical difficulties that many organizations experienced when trying to effectively create, capture, organize, access and use knowledge.

This paper argues that part of the problem historically has been the deployment of KM systems either as standalone applications or in environments where the business benefit was relatively low. As technology has progressed to a point where many of the knowledge capture, storage and retrieval problems have been solved, KM is now emerging as an important competitive differentiator in specific deployment scenarios, including most notably service desk functions.

In order to use KM most effectively in these environments, it is critical that the KM functionality be bound as closely as possible to core processes so that information gathering and processing into reusable knowledge is as automatic and easy as possible for users. Such systems already exist and can make a significant difference to productivity, profitability and competitiveness.

Introduction: In the Know?

If knowledge is power, then most companies are weaklings. Despite KM, defined by Gartner, Inc. as “the creation, capture, organization, access and use of knowledge,”ⁱ having been around and widely used for well over a decadeⁱⁱ, few organizations can claim to have really captured the full intellectual capital present in their workforces. Business is still very much about who you know, and in large organizations it remains all too easy for vital knowledge to be lost. As Gartner, Inc. states: “While human knowledge may be an organization’s most valuable asset, much of this knowledge is never shared.”ⁱⁱⁱ

Part of the reason for this may be that KM was often seen almost as a standalone resource, leading to a perception that a business could have a repository of knowledge in a similar way to having a database of customer details or a store of financial data. As a result, KM implementations are usually independent from the core processes that allow people to do their jobs. In most situations, however, corporate knowledge is actually tied closely to corporate processes, and if the knowledge has to be stored, managed or accessed independently of the process concerned then the KM system is likely to be poorly used.

A further challenge is that there are a number of human factors which make KM difficult to implement. The average person is unlikely to take the time to store or access knowledge if this involves any significant effort, since the perceived rewards are very low. (As Gartner, Inc. points out, “Users resist the extra work and trouble of manually categorizing what they create.”^{iv}) People who have a lot of knowledge to share may not want to do so for fear that they will lose their power within an organization. Or conversely, they may dread being recognized as an expert who then gets bombarded by queries from all quarters.”

With all this, it is understandable that some businesses may be wary of the potential of KM. There are some areas, however, where KM is now starting to come into its own.

Service Desks: A Specific Case

First line support functions typically spend a considerable amount of time on repetitive issues. This time can be shortened by capturing the first instance of a repetitive incident and next time it is encountered, dynamically presenting the solution, either as learned knowledge or as a structured process sequence of events. This frees up the time of the first line staff and enables them to focus on the cases that require more indepth investigation. If specialist input is required, their detailed investigative work can also be captured and represented—either for another specialist, for members of the service desk function or even—if appropriate—out to the customer.

According to Gartner, Inc., “Expertise location is most productively applied in well-bounded situations. Customer service remains a classic area of application.”

Because service desk knowledge is so tightly allied to the initiation of and integration with other business processes, the correct application of KM can have a major impact on product or service quality, productivity, staff motivation and other key measures of corporate performance including of course, the achievement of significant cost savings throughout the business.

Before and After

Take the situation where a customer (internal or external to the organization) runs into a highly complex problem which requires technical support. If the service desk is not using KM, the following steps may ensue:

1. An enlightened customer may first try to solve the problem themselves by consulting web-based support pages online.

2. If this does not work they will call the service desk (most likely having to queue until a service agent becomes available).
3. If the agent cannot solve the problem immediately, they may escalate it to an expert on the team, who may already be dealing with a number of similar queries.

As anyone who has experienced this situation will testify, the above process frequently takes too long; usually hours and sometimes days. The customer suffers and service desk productivity takes a hit, too; every minute spent by an agent trying to fix a problem where the solution exists in someone else's mind, is a minute that could be spent dealing with other calls. And the irony is that someone usually knows the answer; it is just the absence of KM that prevents it from being located sooner and also prevents that knowledge being captured at the moment it is used and made available for reuse.

Gartner, Inc. observes: "There is no quicker way to get an answer than to find a person who knows. This problem has become particularly acute in today's virtualized and geographically distributed organizations. Large enterprises often have the problem of not knowing 'who are the experts', and this hinders collaboration or reuse of expertise."

In theory, in a perfectly KM-enabled service desk environment, virtually all straightforward or repeated queries could be solved at the first stage, for example, by a visit to web-based support and information pages.

This is because all solutions will automatically be correctly documented and stored as they are first worked upon, then published in a way that makes them easy to find and available as appropriate to a relevant and authorized person.

Now, if a customer still needs to speak to someone at a service desk, he or she will be able to get through sooner because the level of call traffic is reduced. And it is more likely that the first service agent they come across will be able to help them, since the agent will be able to access advice that is presented dynamically on screen as the level of information about the issue grows.

Finally, if the fault really is of a 'never seen before' type, specialists called in to deal with it will be able to work collaboratively and use the work already done and documented, by other agents to come up with a solution much more quickly. Once a solution is found, it enters the KM database so it can be immediately available to the appropriate audience.

Dream or Reality?

To sum up, productivity is improved; customer satisfaction gets a boost; first line fix rate improves, skilled employees are freed up to deal with more preventative, complex and time-consuming problems; if an agent or expert leaves, their knowledge stays behind; and problems are solved more quickly, which makes the organization as a whole more effective and more competitive.

Too good to be true? This may have been so in the past, because KM systems were not integrated tightly enough with service desk management, but the situation has changed recently with the advent of KM technologies that are an integral part of the service desk systems, not add-ons to it.

Systems such as the Active Knowledge intelligent business application, part of the LANDesk® IT Business Management (ITBM) suite of products, enable support staff, employees and customers to easily build and effectively deliver timely, valuable, structured and validated knowledge without huge amounts of manual data entry and without distraction from their day-to-day activities.

The system captures and builds knowledge from the outputs of everyday processes and activities, with no rewriting or redefining of existing documentation, so people do not need to do anything above and beyond their usual jobs in order to benefit from KM. This gets around what has historically been one of the major barriers to the successful adoption of KM: the effort involved in creating new content and the fact that this activity is seen as diverting service staff from their primary function.

The knowledge that is captured by the system can be automatically presented for editing and verification if required before being made generally available to the skilled or even unskilled service management, support and user community.

In addition, the system has the ability to use existing internal and external sources of KM-related content, so previously created documents, web pages and data from other disparate systems are consolidated into an intelligent contextual presentation of suggested advice. Furthermore, tracking of the type, value and usage of knowledge takes place automatically, allowing more 'proven and valuable' knowledge to be presented before less useful information.

And lastly, the knowledge can be used across a wide range of service desk-based applications, from customer call centres to internal IT help desks (where it can also be incorporated into Problem, Change and Configuration Management processes) and into other functional areas of an organization such as HR and facilities management services.

Towards Business Process Management

Gartner, Inc. sees the application of KM techniques and processes as a key step in creating better business value through Business Process Management or BPM.

The analyst says: “BPM is about capturing and leveraging knowledge from across the organization to make better informed decisions and to innovate new ways of doing work.”^{vi}

It adds: “Business process management is a step forward in moving knowledge about processes and decision making from people’s heads and into explicit form. In doing so, knowledge is made accessible, reusable and more valuable. BPM technologies make process flows and business policies (expressed as business rules) explicit, abstracted and visible to business managers, independent of the resources (human and machine) that perform the tasks. These tools empower businesses to take more direct control of managing the changes to work, because process models are directly linked to process execution.”

“Although capturing business process knowledge and execution isn’t explicitly defined as an element of BPM, leveraging this process knowledge is implied throughout this definition. For a knowledge worker, BPM requires people in the organization to transfer their knowledge of business operations into business process models, business rule repositories and process/event control systems that can learn over time.”

An Important Opportunity

The recognition of the potential of full integration of KM with service desk processes is an area being closely followed by innovative technology companies such as HP, Sun, Novell, Microsoft and LANDesk, but its use has yet to become widespread among central IT support departments. Combining technology with a best practice method called Knowledge Centered Support (KCS) offers all support and service functions a clearly defined set of practices to simply and easily capture meaningful, reusable knowledge while providing a vastly improved level of support.

Given its relative ease of deployment and use alongside applications such as LANDesk® Active Knowledge, there thus appears to be a significant opportunity for forward-thinking organizations to seize an important competitive lead through service desk-related KM. This is likely to reflect a more widespread appreciation of KM in general. Gartner, Inc.^{viii} predicts that “In 2006, knowledge management will support

highly structured business processes as well as unstructured knowledge work. Mature processes and technologies will offer solid support for KM while emerging techniques will trigger new thinking about extracting the value from organizational knowledge.”

Conclusion

The time has come for businesses to reappraise the role of KM in service desk activities. Powerful new KM applications can allow agents to easily build up knowledge bases which can have a tremendous impact on the efficiency and effectiveness of service delivery. The timeline for widespread deployment of such applications is expected to be short, in the order of 12 to 24 months, meaning that organizations that do not contemplate the addition of KM to their service desk activities soon could shortly be in a position of significant disadvantage with respect to their competitors.

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