Knowledge Management: the fuel for driving efficiency

PRESENTED BY:
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Introductions

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Session Agenda

- Getting Started
- Templates
- Techniques to Drive Self-Service Adoption
- Outcomes and Challenges
- Q & A
Level Setting

- How Mature is Your Knowledge Management?
- Where do you work? (IT, Student Success, Teaching?)
- Do you use/trust/promote your KB?
- What tool(s) do you use?
Knowledge Management Principles
Knowledge Centered Service

**Solve**: Use the natural process of problem solving, in response to actual requests to collect and document solutions.

**Evolve**: Measure and monitor effectiveness. Drive capture upstream.
Don’t wait to start KM “when we mature”
- You don’t do KM when you mature; you mature when you do KM

Knowledge Management will help you mature and
- Improve your Incident management
- Make your service desk more effective
- Make your users happier
Start Small

▪ Top Five
  ○ Top most important services
  ○ Top issues @ Service Desk
▪ Review what’s used, what is needed, what is missing
▪ Rinse, repeat
Avoid “Lift and Shift”

- *Do* inventory your current knowledge repositories
- *Don’t* just copy them to your new system
- Apply “Top 5” approach to your existing content
Align Strategy to Culture

- “Culture beats strategy every day of the week"
  - Formal, structured approach – approvals and reviews
  - Looser, faster approach – put something up, see what works, revise on the fly
  - Either approach can work - but you need to find something that will work in your org

- The best Knowledge process is one that you follow
- The best KB is the one that you use
Change the Culture

- KB is your default
  - Gaps are not problems, they’re opportunities
  - “What do you want to see in KB” as opposed to “No results found"

- Reward KM behavior
  - Most articles written or updated
  - Most Incidents resolved with Knowledge
Miami Wave Implementation

- Wave 1: Pilot Group -- subset of Service Desk
- Wave 2: All Service Desk
- Wave 3: Willing Solver Groups
- Wave 4: 3rd Party Help Desk
Templates: Anatomy of Article Content
Unable to connect my iPhone to MU-Wireless

Issue/Question

Do
- Use Client Words
- Phrase multiple ways

Avoid
- Grammar Nazis

Environment

- iPhone
- iPad
- MU-Wireless
- iOS

Cause

- Your iPhone needs to trust Miami’s security certificate

Resolution

1. Tap the Settings app on your home screen
2. Next, tap General
3. Tap Reset
4. Tap Reset Network Settings
   - Note: This will cause your iPhone to forget all wireless networks
5. Once your phone restarts, tap the Settings app on your home screen
6. Tap Wi-Fi and then MU-Wireless
7. If a certificate verification appears, tap Trust
8. Enter your UniqueID and your MUNet password
9. Tap Join
Environment

Do

- Provide context
- Align Taxonomy with Service Catalog

Avoid

- Overly specific (e.g., MacOS 10.2.1) unless solution only applicable to a particular version
Cause

- **Do**
  - Use client-friendly terms
- **Avoid**
  - Overly technical explanations

Unable to connect my iPhone to MU-Wireless

**Issue/Question**
- I've tried forgetting MU-Wireless multiple times, but I still can't connect with my iPhone
- I cannot connect to MU-Wireless with my iPad

**Environment**
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**Cause**
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6. Tap **Wi-Fi** and then **MU-Wireless**
7. If a certificate verification appears, tap **Trust**
8. Enter your **UniqueID** and your **MUNet password**
9. Tap **Join**
Solution

- Do
  - Use Step-by-step
  - Write to your audience’s level of expertise
- Avoid
  - Pictures/screen Grabs

Unable to connect my iPhone to MU-Wireless

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Solution Missteps at Miami

- Articles that say to contact the Service Desk being used by the Service Desk
- Articles that give advice like “contact MiTech” but do not help with the root problem
- Separating behind-the-scenes solutions versus client solutions
- Integrating troubleshooting steps
Response Templates

▪ Do
  ▪ Include placeholder text to be replaced when used
  ▪ Promote self-service next time

▪ Avoid
  ▪
Escalation Instructions

- Do
  - Include required troubleshooting steps
  - Specify information to collect
  - Cross-link related solutions
  - List probing questions to ask
- Avoid
  - Linking escalation articles to tickets

Escalation Procedure: Canvas

Asset ID
10185

All Unsolved Cases
Escalate to eLearning unless the Blackboard Escalation Instructions direct otherwise.

General Information
Canvas is Miami’s LMS (Learning Management System) for which all faculty, staff and students have accounts for general coursework, compliance packages, and other online learning. Each account type is based on the user’s role at Miami with various functionality based on the user type.

Escalation Template (for solver team)
- Course number (i.e., ABC 123)
- Section(s)
- Term (i.e., Fall 2018)
- Specific details about what the issue is and what BB did to try to resolve (if anything)
Driving Self-Service Adoption
Why drive self service adoption?
Identifying Content to Shift Left

![Bar chart showing the portion of articles used and rate of all interactions over time.

- **Jun**: 119 articles used, 11% missing KB reference, 73 public-facing articles used to solve, 17 internal-facing articles used to solve, 68 articles used when escalating.
- **Jul**: 130 articles used, 7% missing KB reference, 68 public-facing articles used to solve, 7 internal-facing articles used to solve, 68 articles used when escalating.
- **Aug**: 180 articles used, 17% missing KB reference, 98 public-facing articles used to solve, 17 internal-facing articles used to solve, 83 articles used when escalating.
- **Sep**: 164 articles used, 16% missing KB reference, 83 public-facing articles used to solve, 16 internal-facing articles used to solve, 83 articles used when escalating.

The chart highlights the trends in the use of articles and interactions, showing variations in the missing KB reference rate and the distribution of articles used for solving and escalating issues.
Outcomes and Challenges
## Miami Outcomes

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Published Articles</th>
<th>Page Views</th>
<th>Ticket Link Rate</th>
<th>Cost per Interaction</th>
</tr>
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<tbody>
<tr>
<td>August 2015 (KB Launch)</td>
<td>100</td>
<td>48k/mo</td>
<td>0%</td>
<td>$22</td>
</tr>
<tr>
<td>Oct-Dec 2016 (Wave 1)</td>
<td>500</td>
<td>44k/mo</td>
<td>25%</td>
<td>$22</td>
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<tr>
<td>Jan-Mar 2017 (Wave 2)</td>
<td>1500</td>
<td>66k/mo</td>
<td>90%</td>
<td>$14</td>
</tr>
<tr>
<td>Oct 2017 - present (Outsource)</td>
<td>1620</td>
<td>83k/mo</td>
<td>80%</td>
<td>$10</td>
</tr>
</tbody>
</table>
Challenges

▪ Separating internal-facing content from external-facing content
▪ Documenting complex problem solving
▪ Duplicating content
▪ Findability
▪ Overcomplicating content standards
▪ Allocating sufficient time for coaching
Other Opportunities for KM

Communications Templates
- Major Incident
- Outage notifications

SOP documentation
- Attach to an Incident, Request, Change
- Checklist or “cheat sheet"
- *Make it easy to do the right thing*
Q & A
Please take a moment to evaluate this session
There are two ways to access the session and presenter evaluations

1. In the online agenda, click on the “Evaluate Session” link

2. From the mobile app, click on the session you want from the schedule > then click the associated resources > and the evaluation will pop up in the list