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Secrets to Top Gun Troubleshooting & Knowledge Capture – Part II

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This is Part II of the two-part DITY. In this DITY the authors revel the secrets to a simple three-step process used for knowledge capture.

The Three-Step Knowledge Capture Process: Part II

The critical difference between a tool that supports the KT process and one that does not is

- the field based nature of the data capture (which is easy to index)
- the quality rules that accompany the tool from KT to provide expectations for information documentation quality standards
- KT Process Coaches to raise documentation quality and "triggers for use".

Effective knowledge capture and search speeds issue resolution. This is not the same as saying "tools" speed resolution!

When best practices are integrated within a tool, efficiencies in a number of areas can be gained, especially in the areas where information was not captured before-because it's very clear whether the information has been documented or not.

Implementing a new CRM and/or KM software package is riddled with issues:

- What information to capture
- What legacy information to migrate
- What fields should contain what information
- How to transfer legacy data into the new tool
- Report generation, etc

Before we begin, we must look at where troubleshooting falls within the business and do a quick health check:

Quick Check: Are we ready to Start?

Achieving world-class troubleshooting performance revolves around having a well-defined foundation to support the actions. What does this foundation look like?

KT defines this to include

- clearly defined business objectives with business processes
- ownership of work flow elements

Additionally, having a well defined performance system model[2] to sustain the expected behaviors is essential. Does it include clearly defined roles, responsibilities, expectations, and feedback strategies? Are we tracking the right metrics, monitoring the performance accurately, and continually improving our services? Have our customers been included in this design? Assuming all is well, let's get back to basics.[6]

In a world of information overload, organizations and individuals seem to treat the ability to gather the relevant information as an individual art form, rather than a systematic method. With a defined process, all individuals can consistently gather the factual and relevant information leading to faster resolve times, and resulting in higher quality of knowledge article creation.

Step 1: Get Clarity-Write it Down: What's going on? Why did this happen? What do we do? What could go wrong, or incredibly well?

If a question was asked, but not written down, was it ever asked? How many times has one called a support desk, been transferred, and asked to repeat the same information over again? Having an approach which consistently gathers relevant factual data and logic, rationally assesses the situation, prioritizes and resolves issues quickly while being under pressure is the key to all steps that follow.

Dramatic business improvements, including those across the ITIL® Service Lifecycle can be achieved by using a structured method to improve the way people solve problems, make decisions, plan ahead, and manage people in projects. Clients who have adopted the KT processes have realized significant performance improvements resulting in:

- more effective collaboration across geographic and support teams
- improved first time fix rates
- reduced escalations
- reduced time to resolve
- higher quality documentation
- reduced operational costs (less time wasted trying fixes that make no sense, dispatch avoidance, etc.)
- higher customer loyalty and satisfaction ratings.

With this best practice structured methodology for troubleshooting adopted by all members of the team, a dramatic improvement in quality of knowledge articles immediately follows. The advantages of writing down the information gathered in the troubleshooting process goes far beyond just helping in solving for cause, it also maximizes the value of the troubleshooting outputs.

Step 2: Exploit the Knowledge Base: Have we seen this before? Have we fixed it before? Is it 'cause unknown'?

When an issue, complaint, problem or concern arrives "best practices" say "search the knowledge base early and often." But what do you search on? How convenient is it to open multiple windows or screens and type in the "right" words to find possible solutions? The ways in which users implement this feature range from informal to highly sophisticated application deployment, integrated with other applications. KT's process aligns data gathering in a consistent format. The need for consistency in documentation enables effective knowledge re-use.

Not only is the tool important-most case management tools have this kind of a field-It is the structure for what is entered into this field and the coaching to require that this structure is followed that makes the difference.

As we know, a proportion of incoming cases are Cause Unknown. Each one should become at least one KB entry. There is more analysis needed to understand what proportion of cases are unique, so not likely to be reused, and what proportion are partly or wholly repeating. This is the area where KT Problem Analysis (PA) adds the most value. A good PA is a good KB entry, and makes it easy to see whether reuse is likely. In a perfect world, a KT Process called Situation Appraisal (SA) would run the first triage. This identifies the need(s) of the customer, and makes clear the nature of their assistance request: information, break fix or how to (possible change request), among others. Then a KB search would ideally present the answer.

> *The format for data structure is important for helping engineers find root cause. It is not, however, simply that providing a tool with a structured approach immediately spawns great quality. Through use of KT process coaching and clearly defined triggers for quality documentation, significant performance improvements are achieved (MTTR, increased FTF, reduced escalations, reduced backlog, etc.). Here, structure within the tool enables and assists the driving of better quality behavior. This really is not "work harder" but "work smarter".*

Amanda Roberts, CEO and Founder of Stone Cobra has often provided advice regarding best practices around knowledge management strategies, some of which are summarized here:

> *The highest gains for knowledge sharing are within the first few days after a new issue is first discovered. This implies that waiting for someone to write and publish the knowledge is a wasted opportunity-capture the information at the time of problem solving and publish at the latest that night for maximum effect.*
>
> *Consistent use of the knowledgebase means it stays current. Experienced agents are revising knowledge in the knowledgebase even though they may have had the solution already in their heads.*

Additionally the knowledgebase should include or allow for tagging in a 'folksonomy' sort of manner, for both internal and external client usage. The level of flexibility is greatly increased while retaining some of the benefits of structure.

> *Make the use of the knowledgebase-the path of least resistance to the solution for customers and agents. If using the KB is a difficult or cumbersome task, it is unlikely to be utilized effectively*
>
> *In the same vein as this old saying, outcomes are more important than activities. For example, you don't really care how many KB articles an agent is writing. What you care about is how much useful knowledge that agent is documenting for others to share. Measuring and putting goals on desired outcomes (and not on activities) promotes a healthy KB.*

Some users have issues with the efficiency of the search engine. More important is the performance system that surrounds creation and updating of KB entries. Direct reward for knowledge reuse rate is a part of it (bonus depends on the number of people using the KB entry to solve a case, and be careful-clever engineers can game this easily) which depends on integration with the KB Tool. It also needs coaches to focus not only on case handling but on KB creation. The coaching element counteracts any delinquency in playing the numbers; technical people always find ways to beat them, driving interesting behaviors.

Step 3: Communicate Progress and Results: Are we there yet? Is it solved yet? What's that team doing? How do we tie it all together? What could go wrong? What could go well? Where else? Are customers really sharing with others?

Clever new user interfaces are being designed for tools and search applications with customer and community portals for exchanging information. But what information should be shared externally? What community content should be listened for? How does one capture meaningful information exchange? Latest trends aimed at maximizing the strategic impact of user-generated content through community management, search engine optimization, and supply/re-use across the Web and through the channels. Connecting end users with company brand products and services and with each other is now evolving a change for traditional ways of marketing and sales execution. Customers who are happy purchase service renewals, system upgrades, and make referrals. Unhappy customers find new suppliers and, of course, tell everyone. Customers are talking to each other. Business can choose to participate in and facilitate these conversations to their advantage or ignore their valuable feedback. Don't assume the competitors are ignoring it as well. Providing useful "Fix" information 'before' an issue is experienced ultimately helps everyone involved.

Additionally, Engineering and Product Teams benefit from the input provided from Support Services. Having an integrated method to provide break/fixes and product features (desired, or undesired), among other concerns, helps evolve more efficient products, tailored to the user needs. This feeds logistics and spares, among others, ultimately reducing the cost of ownership and support.

Summary:

Critical thinking skills are at the heart of organizational development. When crisis strikes, panic and reactive endeavors often ensue. One doesn't need to be a natural people person to inspire great performance in normal conditions, but preparing to think correctly under pressure is a genuinely strategic decision to take in order to prepare for extreme conditions. The Kepner-Tregoe methodology is the "how to" for resolving issues quickly, accurately and effectively, relying on data and logic. The heart of this model is the key to thinking correctly under pressure. Embedding the KT troubleshooting process within the tools and applications used across the workflow, along with best practices in knowledge management, search methods, social media innovations and other WEB strategies, maximizes the value of the business information across the knowledge lifecycle. No longer are the support teams silos to the business, the community, and the customer.

Whitepaper: The Whitepaper, "Secrets to Top Gun Troubleshooting and Knowledge Capture: *Three Steps for Improving Support Performance While increasing Customer Loyalty* can be found at (http://www.itsmsolutions.com/documents/Troubleshooting%20%20KM.pdf

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[1] Luft, J.; Ingham, H. (1955). "The Johari window, a graphic model of interpersonal awareness". Proceedings of the western training laboratory in group development (Los Angeles: UCLA).

[2] http://www.kepner-tregoe.com/theKTWay/OurProcesses-MHP.cfm

[3] Justin Kruger and David Dunning, "Unskilled and Unaware of It: How Difficulties of Recognizing One's Own Incompetence Lead to Inflated Self-assessments," Journal of Personality and Social Psychology, 1999, vol. 77, no. 6, pp. 1121-1134.

[4] http://manyeyes.alphaworks.ibm.com/manyeyes/

[5] http://www.kepner-tregoe.com/servicevalue

[6] http://www.kepner-tregoe.com/SVMHC/

[7] http://www.kepner-tregoe.com/KTPractice/Tech/KT-Accelleration-Application.cfm