

LEARNING MADE EASY

eGain Special Edition

Knowledge Management

for
dummies[®]
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Elevate customer
experience

Empower
employees

Transform the
business

Brought to you
by

eGain

Anand Subramaniam
Ian Jones
Lawrence Miller

About eGain

eGain Knowledge Hub automates and orchestrates customer engagement across touch points. Powered by AI and analytics, our secure cloud solution delivers personalized digital-first experiences, quick business value, and easy innovation. Visit www.eGain.com for more information.



Knowledge Management

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**by Anand Subramaniam,
Ian Jones, and Lawrence Miller**

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Knowledge Management For Dummies®, eGain Special Edition

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Table of Contents

INTRODUCTION	1
About This Book	1
Foolish Assumptions	2
Icons Used in This Book	2
Beyond the Book	3
 CHAPTER 1: Making the Business Case for Knowledge Management	5
Understanding the What and Why of Knowledge Management	5
Knowledge categories	6
Recognizing the Transformational Value of Knowledge	8
Reducing service cost	9
Improving customer service and experience	9
Enhancing omnichannel service and compliance	10
Increasing agent productivity	10
Digitalizing the contact center	11
Facilitating outsourcing	12
Merging contact centers	12
Transforming a contact center to a profit center	12
 CHAPTER 2: Exploring Knowledge Management Use Cases	13
Agent Experience	13
Business Experience	17
Customer Experience	19
 CHAPTER 3: Succeeding with Knowledge Management	23
Establishing Objectives and Success Criteria	23
Getting Executive Sponsorship	24
Building Your Project Team	24
Scoping the Knowledge	25
Assessing the Value of Knowledge	25
Selecting and Managing Experts	26
Maintaining Knowledge	26

CHAPTER 4: Delivering Fail-Safe Innovation with eGain Knowledge Management..... 31

Discovering the eGain Knowledge Hub 31

 One hub, many capabilities 32

 Integration with call tracking systems..... 33

 Quality content, maintained at low cost 34

 Integration with third-party systems for knowledge reuse 34

 Global deployment with a scalable, multilingual solution..... 35

The Unpilot Pilot from eGain 35

CHAPTER 5: Ten Things to Look For In a Knowledge Management Solution and Provider 39

Modern User Experience Design 39

One Knowledge Base 40

Guided Experience 40

Intelligent Search..... 41

Virtual Customer Assistance 42

Compliance 42

Integrations 43

Analytics..... 43

Rich API Library..... 44

Domain Expertise 44

Introduction

“**K**nowledge management (KM) is a poor name for a powerful concept,” says Ashutosh Roy, CEO of eGain Corporation. “Names aside, what KM stands for is the capability to easily and continuously capture, organize, and make available, actionable know-how within an organization. When done right, it unleashes process efficiencies, business model flexibility, market insights, and customer loyalty.”

“Contact centers and customer service organizations provide some of the best examples of successful KM application. However, KM also has irrefutable value beyond the contact center, in IT and HR helpdesks, sales, legal, compliance, and other departments.”

KM is also a confusing topic, thanks to different definitions given by pundits as well as vendors. This book will guide you through what KM is, how to justify its value, how to select a KM system for this new hybrid-work, digital-first era, how to measure value, and how to expand value over time.

Given that the customer contact center is a proven sweet spot for KM, it is a good first place for enterprises to jumpstart a KM initiative. Accordingly, this book will primarily focus on this use case.

About This Book

This book consists of five chapters that explore the following:

- » The “what” and “why” of knowledge management (Chapter 1)
- » Common knowledge management use cases (Chapter 2)
- » How to get started with knowledge management (Chapter 3)
- » The eGain knowledge management solution (Chapter 4)
- » Nine key attributes to look for in a knowledge management solution and provider (Chapter 5)

Each chapter is written to stand on its own. So, if you see a topic that piques your interest, feel free to jump ahead to that chapter. You can read this book in any order that suits you (though I don't recommend upside down or backwards).

Foolish Assumptions

It's been said that most assumptions have outlived their usefulness, but I assume a few things nonetheless!

Mainly, I assume that you are interested in learning about knowledge management solutions for your organization. Perhaps you are an executive, director, or manager responsible for customer service, a contact center, or customer experience. Or perhaps you're responsible for digital transformation or knowledge at a functional or enterprise level within your organization.

If any of these assumptions describe you, then this is the book for you! If none of these assumptions describe you, keep reading anyway! It's a great book and after reading it, you'll have gained new knowledge in knowledge management!

Icons Used in This Book

Throughout this book, I occasionally use special icons to call attention to important information. Here's what to expect:



REMEMBER

This icon points out important information you should commit to your nonvolatile memory, your gray matter, or your noggin — along with birthdays and anniversaries.



TECHNICAL
STUFF

If you seek to attain the seventh level of nerd-vana, then perk up! This icon explains the jargon beneath the jargon and is the stuff legends — well, legendary nerds — are made of.



TIP

Tips are appreciated, but never expected — and I sure hope you'll appreciate these useful nuggets of information.



WARNING

These alerts point out the stuff your mother warned you about (well, probably not), but they do offer practical advice to help you avoid potentially costly mistakes.



CASE STUDY

Read this text for stories about businesses who have had great success with knowledge management.

Beyond the Book

There's only so much we can cover in this short book, so if you find yourself at the end of this book wondering, "Where can I learn more?", go to <https://www.egain.com>.

- » Getting to know knowledge and knowledge management
- » Transforming your organization with knowledge management

Chapter 1

Making the Business Case for Knowledge Management

In this chapter, we explore the basics of knowledge and knowledge management and how successful knowledge management can transform organizations and deliver real business value.

Understanding the What and Why of Knowledge Management

The consumer has spoken.

Forrester Research recently asked consumers, “What created the biggest pain when you contacted a business for customer service?” The answer was loud and clear — the lack and consistency of agent knowledge, followed by the difficulty of finding relevant answers on company websites. The feedback sounded like a broken record for customer service pain across a whole bunch of industries.

But what is knowledge in the context of an enterprise? It usually evokes visions of long documents and content repositories. But true knowledge or modern knowledge is information and know-how that is served up to the user in the flow of work and in the context of a business process. Knowledge is not the haystack, but the needle in the haystack.

Knowledge management is the process of creating, curating, delivering, and optimizing information and know-how in an organization. It consists of a set of practices to maximize the value of an organization's knowledge by leveraging it at critical points in business processes. While document or content management, often used by many as a synonym for knowledge management, is focused on the content creation process, knowledge management unlocks business value from content.

Knowledge categories

Knowledge can be categorized in different ways — types, use cases, access and curation, and delivery modes, for example.

» Types

- *Explicit:* This is knowledge that can be easily and readily articulated, documented, stored, shared, and accessed. What you find in your enterprise knowledge base is mostly explicit knowledge. It can be a knowledge article, PDF, blogpost, video, user's guide, and so on. Expertise that your contact center agents, authors, and knowledge managers capture in the knowledge management system, or user posts harnessed into knowledge from social media and communities.
- *Tacit:* Gained from personal traits, experience, intuition, and judgment, tacit knowledge is often difficult to capture and transfer except perhaps through observation and association. Sophisticated knowledge management systems (KMSs) that can leverage artificial intelligence (AI) and reasoning fare better in their capability to infer and deliver tacit knowledge in the flow of work.
- *Implicit:* The opposite of explicit knowledge, implicit knowledge is a kind of knowledge that is difficult to express to others by writing or using words. It isn't tangible or codified or immediately shareable in words or documents. Knowing when the dough is perfectly

kneaded is an example of implicit know-how. Another example is being able to tell what a customer needs to feel better in a customer service scenario.

» Use cases

- *Informational*: Simple information such as a customer's account balance or the status of an order.
- *Transactional*: "How to" information on procedures such as how to set up autopay or how to return merchandise.
- *Situational*: Solving a problem by asking the right set of questions through real-time conversational guidance and taking the right next steps through real-time process guidance, all in the flow of work.

» Access and curation. Know-how, usually, exists in one of three forms in enterprises (see Figure 1-1):

- *Developing knowledge*: A significant portion of enterprise know-how is in this form. It tends to be in flux and is not ready to be shared widely. It is rarely accessed directly by KMSs or customer engagement systems.
- *Documented knowledge*: Some know-how is captured in correct and compliant form by subject matter experts (SMEs), but the form itself may be hard to consume. It's usually available as hard-to-find, not-contextual text.
- *Curated knowledge*: Also known as "just-right" knowledge, this is knowledge that is correct, compliant, and contextualized. It's curated by authors with use cases in mind. Effort is made to make it findable as well as consumable. No wonder it's a tiny fraction of the knowledge in any company!

» Delivery modes

- *Pull*: Contextual knowledge served to customers or an organization's employees on demand, for example, when they ask a question.
- *Push*: Contextual knowledge pushed to customers in the course of their journeys to help them make progress in their journeys or to contact center agents as they interact with customers in the form of conversational (next best thing to say) and process guidance (next best steps to take).

KMS goes beyond technology to include best practices, knowledge elicitation methods, knowledge maintenance, and knowledge governance, as well as softer issues such as incentivizing and fostering a knowledge sharing culture.

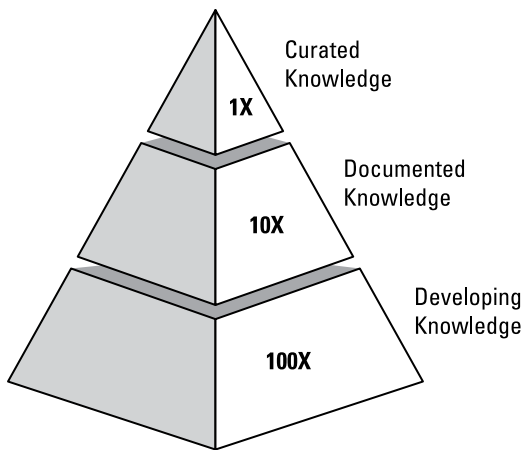


FIGURE 1-1: Knowledge typically exists in the form of developing knowledge, documented knowledge, and curated knowledge.

Recognizing the Transformational Value of Knowledge

Done right, knowledge management transforms — rather than incrementally improves — business processes. Knowledge management initiatives that are based on best practices for implementation and focused on meeting well-defined strategic objectives create hard-to-replicate competitive advantage by improving the effectiveness, efficiency, experience, and even emotion of stakeholders, and creates breakthrough business value.

From the perspective of contact center customer service, a proven sweet spot for knowledge-enabled value creation and a good starting point for businesses to start using knowledge, KMSs are deployed to achieve specific, measurable results in typically one or more of the following areas:

- » Reducing service cost
- » Increasing agent productivity
- » Improving customer service and experience
- » Enhancing omnichannel consistency and compliance
- » Digitalizing the contact center

KM also helps sustain and even improve the quality of customer service in scenarios such as contact center outsourcing, contact center consolidation in mergers and acquisitions (M&A), and converting a contact center to a profit center.

The following sections examine each of these goals.

Reducing service cost

Knowledge management helps companies lower the cost of customer service by reducing the number of repeat calls through improved first-contact resolution, slashing call handling and wrap-up times, reducing the need for agent training, and maximizing the agent competence to solve issues. Improved agent performance reduces agent churn and the costs to hire, train, and onboard new agents. Knowledge management can also enable companies to divert a significant amount of customer traffic to digital self-service. Improved customer service often produces results in other operational areas such as repeat business and new sales.



TIP

Self-service automation, powered by modern knowledge, enables 24x7 access to service and reduces the number of routine queries coming into the contact center, while allowing the organization to cost-effectively scale service. Augmenting the capabilities of Level-1 agents improves the customer experience, while reducing the need for Level-2 agents. In other words, self-service can operate at the competency of Level-1 agents and Level 1 agents at the competency of Level-2 agents, allowing the business to cost-effectively scale its customer service operation and slash service costs. With effective knowledge management, the need to find expensive individuals who have both interpersonal skills and deep domain knowledge is greatly reduced.

Improving customer service and experience

Knowledge management also leads to better quality of service. Customers are more likely to receive the right answers faster, without having to be placed on hold or transferred to another agent.



REMEMBER

According to Forrester Research, the higher a business scores on their Customer Experience Index, which measures the effectiveness, ease, and emotion in customer service, the higher the chances of its customers buying more goods and services and

remaining loyal to the business. Customer service improvements are typically measured by the following metrics:

» **Customer satisfaction/advocacy**

- *Net Promoter Score (NPS)*

» **Effectiveness/experience**

- *First-contact resolution*
- *Average wait time*
- *Abandonment rate*

» **Efficiency**

- *Average handle time*
- *Average speed to answer*
- *Speed to competency*
- *Reduction in training*

Enhancing omnichannel service and compliance

Without a centralized KMS, it is very difficult for a business to provide consistent answers to customer queries regardless of what channels customers use — for example, messaging, phone call, email, social — or through which mode of interaction — self-service or agent-assisted service — or which agent they interact with. Inconsistent answers create customer confusion and frustration. Moreover, it may prompt customers to engage in answer shopping to find an agent who will give them the answer they want — the best price for a product or a more lenient returns policy, for example! Moreover, consistency is important for regulatory compliance.

Increasing agent productivity

Contact centers, including internal help desks, invest far too much in agent training. Most agent training is focused on learning (pre-call training) which may have been a good idea at one time, but is now out of step with the self-service transformation that has swept contact centers and help desks everywhere.

Before phone and digital self-service became popular, the 80/20 rule applied well to service interactions: 80 percent of the calls were about 20 percent of the issues. So, it made sense to train

agents on the 20 percent of issues. They would solve 80 percent of the calls and escalate the rest. Today, self-service targets the same 80 percent of calls and other forms of digital contact. As a result, the issues that get to agents are more complicated and definitely not the kind that can be easily learned in a few weeks of novice agent training. In other words, what Level-1 agents used to do is now automated with self-service, requiring Level-1 agents to acquire Level-2 skills or else.

At the same time, product cycles have shortened, new product variations are exploding, and agents are getting burned out. The training paradigm needs to shift from pre-call to in-call. Instead of teaching agents predefined processes, conversational and process guidance delivered to the agent in the flow of customer conversations by modern KMS can help them easily resolve customer issues and relieve their stress.



TIP

This interactive approach, powered by eGain, helped a premier telco to improve first-call resolution by 37 percent and NPS by 30 points, while accelerating their agent speed to competency by 50 percent across more than 10,000 agents and associates in over 600 retail stores!

Digitalizing the contact center

According to the latest Forrester report on the future of customer service, digital self-service interactions now exceed live-assist interactions. With digital channels proliferating and becoming an important touchpoint for customers (this trend was accelerated by the recent pandemic), businesses must understand the critical role that knowledge management can play in digital-first, omnichannel customer service.

Most businesses are likely to end up with omnichannel customer response systems and will have to handle cross-channel customer journeys and possible escalations. One of the most important strategic considerations is ensuring that the knowledge management system becomes a central omnichannel resource, available for both phone and digital channels. Moreover, since most calls coming into the contact center are from smartphones, organizations can deflect such calls to digital self-service (for example, chatbot virtual assistance) or agent-assisted digital service (for example, messaging or live chat) by sending a link to the smartphone for the customer to click on. The conversation can be bootstrapped with context gathered from the interactive voice response (IVR) that would have preceded the escalation interactions.

Facilitating outsourcing

When a company decides to outsource customer service, it's not a simple matter to train a whole new crew of agents on the intricacies of an unfamiliar product. Knowledge management can make the transition virtually painless, while significantly lowering the cost of training. This factor can be used as a negotiating point to lower the price of outsourcing contracts.

Merging contact centers

Merging contact centers is in many ways similar to outsourcing, in that a large number of agents often need to be trained in areas that are completely unfamiliar to them. Knowledge management can enable the creation of a central repository for all knowledge required by agents of the merged entities, ensuring a consistent approach to problem resolution.

Transforming a contact center to a profit center

The agents who are best at service and support don't necessarily do well converting support calls into sales. A KMS, while guiding agents in solving customer problems, can suggest contextual selling opportunities for complementary offerings and provide agents the scripts and information needed to present those offerings to customers. In this case, the KMS not only provides "the right answer," but actually helps the agent sell by helping them say the "right thing" and make the "right offer."



REMEMBER

Knowledge management is a strategy, not just a tactic, and it is a set of business practices, not merely a technology.

- » Improving agent experience
- » Elevating business experience
- » Delivering better customer experience

Chapter 2

Exploring Knowledge Management Use Cases

In this chapter you explore three common knowledge management use cases — agent experience, business experience, and customer experience with real-world success stories. Note that knowledge management often improves stakeholder experiences all at once and the stories featured in this chapter reflect that power.

Agent Experience

Delivering knowledgeable and consistent customer service is a constant challenge for agents in every organization. According to a worldwide survey conducted by eGain, the biggest challenges for agents include the following (see Figure 2-1), 65 percent being knowledge-related:

- » Finding the right answers to customer questions (26 percent)
- » Different systems/information sources give different answers (25 percent)

- » Hopping from one application window to another (20 percent)
- » Hard to keep up with all the new information/changes they need to know about (14 percent)
- » Other issues (15 percent)

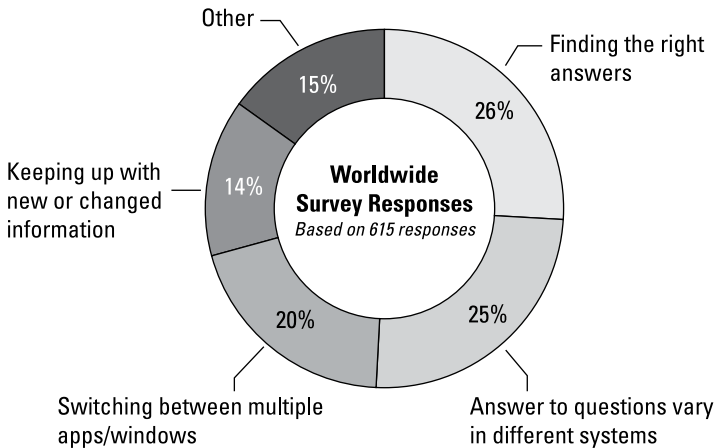


FIGURE 2-1: The biggest problems for agents (with a customer on the line).

The root cause of these challenges is the lack of an intelligent and unified omnichannel knowledge management system (KMS) that can guide agents to answers, resolution, or advice that the customer is seeking to get in a consistent manner regardless of touchpoint.

Such a system delivers transformational benefits such as improvements in first-contact resolution, average handle time, average speed to answer, and speed to competency for agents. Moreover, many companies have experienced benefits specific to their industry, such as the premier health insurance company, discussed in the nearby success story, which was able to elevate agent and customer experience and reduce training time even when all their agents had to go remote overnight due to the onset of COVID-19.

A KNOWLEDGE HUB IS JUST WHAT THE DOCTOR ORDERED FOR A LEADING HEALTH INSURANCE CARRIER



CASE STUDY

A leading health insurance carrier, with millions of members and thousands of agents, was struggling with out-of-control call handle times.

Challenge

Agents weren't able to give customers accurate information in a timely manner because customer service knowledge was spread across 17 different systems! Key multi-step customer service procedures, such as conducting and documenting claims research, required logging into and gathering information from multiple sources.

The company knew it had to make it easier for agents to find answers. Besides, training new agents was taking an unacceptably long 12 weeks. And keeping knowledge up to date across 17 systems was impossible with manual processes and tougher and ever-changing compliance mandates.

Solution

The insurance carrier went looking for a new knowledge solution for their contact centers. After creating a 28-criteria list, it did proof-of-concept deployments with two vendors. eGain's unique "Innovation in 30 Days" pilot convinced it that eGain was a good fit, and what they really needed was a knowledge hub, connected to existing systems. Here is why they chose eGain:

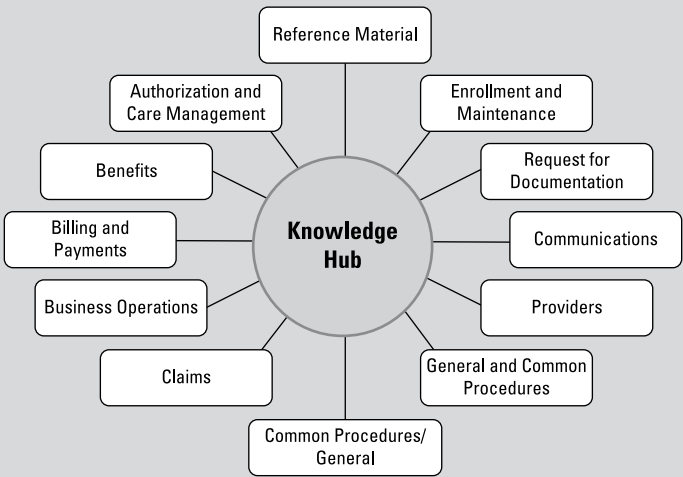
- Comprehensive knowledge management capabilities, all out of the box
- Expertise in knowledge management and healthcare customer service best practices
- Certified connectors to customer relationship management (CRM) and contact center platforms, with open application programming interfaces (APIs)
- Unique consumption model with risk-free production pilot

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Results

The insurance carrier partnered with eGain's expert team for an incredibly quick, agile roll-out. They successfully consolidated the 17 legacy systems into a single Knowledge Hub (see the figure below) with more than 1,000 knowledge articles and 2,000 agent users. Because eGain's team was able to transfer all of the insurance carrier's knowledge into the Knowledge Hub, no new content had to be created and the roll-out took just six weeks. The Knowledge Hub's flexibility made it easy for the carrier to build artificial intelligence (AI)-enabled guided knowledge flows for agents, giving them access to consistent, accurate (and traceably compliant) information in a fraction of the time previously required. After the COVID-19 pandemic hit, it also made it possible for agents to work from home without sacrificing the speed or quality of their customer service.



Maintaining their knowledge is now fast and efficient. Articles are updated within the eGain Knowledge Hub (replacing the manual, out-of-band process), and agents can provide inline, precise feedback on the quality of articles. The closed-loop feedback system has improved the accuracy of knowledge searches to 96 percent in less than a year. Personalized portals allow agents to focus on relevant information.

eGain Managed Services has helped the client accelerate knowledge consolidation across brands, with speed and quality. As a result, new policies and procedures are being regularly added to the Knowledge Hub and new teams onboarded quicker than planned. Serving customers has never been easier for agents, thanks to eGain Knowledge Hub.

Business Experience

Business experience is a very broad topic, given the number of stakeholders in the organization. In the contact center context, it could refer to the experience of business stakeholders such as CxOs, heads of contact center operations, contact center supervisors, and even knowledge authors and managers. Knowledge is such a panacea to operational ills that it elevates the experiences of all these stakeholders at the same time!

In industries such as telco, manufacturing, and utilities, unwarranted product exchanges and field visits (also called engineer visits or truck rolls, depending on the industry), triggered by customers' inability to use the products right or follow instructions, drive up operational costs. The nearby case study talks about how knowledge-powered customer service, delivered in the front-line by contact center staff, helped reduce unnecessary handset exchanges and returns to dramatically reduce such costs.

EGAIN KNOWLEDGE HUB REDUCES UNNECESSARY HANDSET EXCHANGES AND SAVES MILLIONS OF POUNDS



CASE STUDY

To deliver on its customer service commitments in a sector where there is an ever-increasing complexity of products, plans, and services with a persistent focus on cost control, Virgin Mobile implemented the eGain Knowledge Hub. The result has been improved levels of service, happier customers, and cost savings of millions of pounds a year.

(continued)

Challenge

To deliver on its service promises, a leading mobile operator has built a team of several thousand agents. The growing sophistication of mobile handsets and the increased variety of the services provided on them means that the challenges — and costs — of delivering cost-effective customer service to mobile customers keep going up.

Solution

The company wanted to ensure its contact center agents managed their customer interactions in a consistent way. They also needed information to improve the resolution of calls at first point of contact and reduce the need for repeat calls by the use of an intuitive knowledge base.

The organization realized that a knowledge management system would provide much needed assistance to agents to improve the accuracy of their problem diagnosis. This would allow all service agents — irrespective of experience — to have direct access to that knowledge, and consequently, keep customer service levels high in the face of an ever-increasing range of products and services. Eventually, the decision was made to select the eGain Knowledge Hub.

Results

eGain delivered benefits that were considerably better than was predicted in the ROI case. The Knowledge Manager notes, “The original business case called for eGain to pay for itself over a three year time period and one of the statistics in there was a 5 percent reduction in handset exchanges. What we’ve actually found six months down the line is that there has been a 38 percent reduction in handset exchanges.”

Key results include:

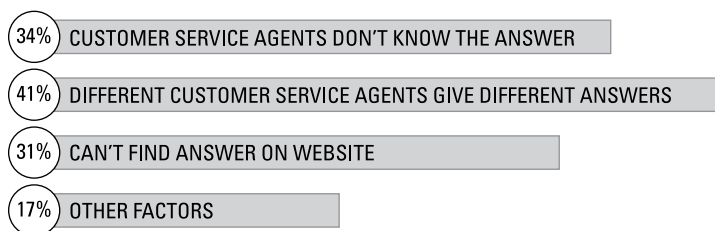
- 38 percent reduction in handset exchanges within the first six months
- 30 percent improvement in accuracy of questioning
- 23 percent improvement in call quality
- 19 percent improvement in first call resolution
- Improved agent satisfaction evidenced by a 90 percent improvement in call handling

Customer Experience

The verdict is in. According to Forrester's U.S. Customer Experience (CX) Index Report, consumers said that less than 1 percent of U.S. businesses deliver excellent customer service. The same research found that the state of CX remained stagnant among Canadian businesses, and none of the U.K. companies received an excellent score either.

A recent Forrester Consulting survey, commissioned by eGain, asked what created the biggest pain point in getting customer service from businesses across retail, communication service providers, banking and financial services, property and casualty insurance, health insurance, healthcare providers, utilities, and government. Allowed to pick up to two options, thousands of consumers cited the following three as their top pain points (see Figure 2-2):

- » Different customer service agents give different answers (41 percent)
- » Customer service agents don't know the answer (34 percent)
- » Can't find an answer on the company's website (31 percent)



(Source: Forrester Consulting survey of 5,000 consumers).

FIGURE 2-2: The biggest pain point when contacting a company for customer service.

Clearly, it is knowledge or bust when it comes to the customer experience, based on what these consumers are saying.



CASE STUDY

DELIVERING SUPERIOR FINANCIAL SERVICES TO CORPORATE CLIENTS

When you provide core financial services to 60,000 corporate customers around the globe, your digital customer service platform had better be capable of delivering superior, speedy, and reliable assistance. That's why a major financial services firm turned to eGain when it needed help in managing an expanding customer service load within its Business Banking division.

Challenge

Faced with a rapidly expanding customer base and the need to boost productivity without increasing staff, the firm's executives began searching for specialized tools to help optimize the Business Banking call center operations. In addition, an even more practical impetus drove the process forward. "We were running out of space in the call center," says the call center manager. "We were looking to increase the number of customers that an agent could handle, so we wouldn't have to hire more agents. We simply didn't have anywhere to put them!"

Solution

After reviewing a number of potential solutions, the firm chose eGain Knowledge Hub, because in their words, "It seemed easy to use, easy to develop and capable of scaling to our company's worldwide operations."

Once in place, eGain Knowledge proved itself almost immediately. "Before we introduced eGain, we were using basic scripted software," says the call center manager. "We weren't in control of the calls, and our agents were all over the place. The customer was dictating the pace of the call, and we were solving problems by relying on information that agents were carrying around in their heads."

A critical component of the knowledge system is the integration with the company's legacy customer database. "The calls are logged in the CRM system, then we query the knowledge base to find the solution to the customer's issue," explains the manager of the call center's technical infrastructure. "eGain's professional services team worked closely with us to develop the linking code."

Rather than copying and pasting the dialogue between agent and customer, the information is entered only once in a database shared by the CRM system and eGain applications. “We can review calls by querying one database, which then contains something similar to an audit trail of the problem resolution process.”

Results

The customer service team quickly achieved gains in virtually every area of call center performance. “When we introduced Knowledge, it put us in control of the call,” the call center manager declares. “We dictated the pace of the call and were able to provide consistent answers to the customer. We went from solving about 70 percent of calls at first point to solving around 95 percent of all calls without requiring an escalation.

Key results include:

- An increase in First Call Resolutions from 70 percent to 95 percent.
- A 67 percent decrease in average call handling time.
- Seventy five percent of calls are picked up within 11 seconds.
- An increase in the overall customer satisfaction rating from 88 percent to 97 percent.
- A 70 percent efficiency gain in the agent-to-customer ratio.
- Agent training time decreased from ten to four weeks.
- Minimal staff expansion even as the customer base doubled.

IN THIS CHAPTER

- » Setting the right goals
- » Ensuring executive buy-in
- » Picking your team members
- » Capturing your most valuable knowledge
- » Avoiding “biting off more than you can chew”
- » Picking the brains of your experts
- » Keeping your knowledge management system current

Chapter 3

Succeeding with Knowledge Management

In this chapter you will learn how to get started with a successful knowledge management deployment using best practices for implementation.

Establishing Objectives and Success Criteria

As with any journey, before you get started you need to know where you're going. Establishing clear objectives for knowledge management that are aligned with your business goals and defining what success looks like, as measured by metrics, is critically important.

Establishing the value of knowledge enables prioritization, but this process may also involve tradeoffs. For example, there are

typically three objectives for knowledge management and customer services that may, at times, be competing goals:

- » **Average handle time (AHT) versus first-contact resolution (FCR):** The shorter the average duration of a call, the lower the cost to the business. But FCR may suffer if the agent is simply focused on getting the customer off the phone or any other interaction channel, for that matter. The next two goals illustrate this competing point.
- » **Customer retention:** Educating customers about unused features can result in higher FCR, greater customer acceptance, and lower churn. It may also help preempt and avert future support calls.
- » **Upselling and cross-selling:** It may be that the best solution to a customer's problem is selling that customer a higher tier of service or an add-on product or a product upgrade, which may not be possible to do if AHT is the only focus.



REMEMBER

Organizations must match their knowledge systems, processes, and metrics to the service and business priorities.

Getting Executive Sponsorship

The success of knowledge initiatives involves change in the nature of people's job, their behavior, and possibly the power dynamics across individuals and departments. Moreover, you may need some collaboration from other groups such as IT.



TIP

Make sure you have a committed executive sponsor to help drive the success of your initiative and get you the requisite help from other organizations. The executive should communicate the importance of the initiative to the contact center and other relevant departments at the initial deployment as well as on an ongoing basis, recognizing contributors to success along the way.

Building Your Project Team

Remember, teamwork makes the dream work! In a knowledge management project, there are four key roles that need to be defined, as follows:

- » **Lead expert:** The individual (or individuals) who decides how the knowledge base will be organized, which topics will be covered, and to what extent.
- » **Knowledge contributors:** Subject matter experts and contact center agents who have good performance records and can provide content suggestions and process expertise.
- » **Knowledge authors:** Individuals who are skilled in writing and know how to use various authoring tools.
- » **Project manager:** The individual who keeps the project on track, on time, and on budget.



TIP

Depending on the scope of your knowledge management project and the size of your organization, one individual may have several roles.

Scoping the Knowledge

When defining the scope of the knowledge base, the most common mistake is to try to do too much. Overly ambitious deployments almost always result in what's called the Swiss cheese problem — a knowledge base that is solid in places, but full of holes. This is a recipe for failure, because if users can't find the answers that they want or get the wrong answers, they will quickly stop using the system.



TIP

To start with, it is better to be thorough with a limited scope than to superficially cover a broad area. For instance, for a business that sells printers, scanners, fax machines, and copiers, the best approach may be to start by covering only one product line thoroughly — perhaps the most popular or the most technically challenging product that generates the most queries — rather than all the products at once.

Assessing the Value of Knowledge

Take a holistic approach to assessing the value of knowledge. Experienced KM providers like eGain offer a value modeling service, based on hundreds of implementations.

Selecting and Managing Experts

Subject matter experts (SMEs) and experienced, high-performance agents are great sources of knowledge. Successful knowledge management depends as much on the questions as the answers. It is sometimes difficult for subject matter experts to think and speak like ordinary customers who may not know terms like a force restart or complex details like whether the low-power mode is on in their iPhone 13 or if their mutual fund is front-loaded or back-loaded. Frontline agents can often help translate their expertise into more usable knowledge.



WARNING

There is another very important potential issue with experts — the reluctance to share knowledge and the fear of being “replaced by a machine.” Businesses must therefore plan and communicate how the role of their experts will change once a knowledge management solution has been implemented. Moreover, businesses should create incentives for SMEs and agents to share their knowledge with the rest of the organization. Rewarding people more for sharing than for knowing will help create a sharing culture in the organization.

Maintaining Knowledge

Once in place, most knowledge management deployments follow a predictable pattern of dramatic initial success and glowing upper management support, followed by a period of decline, and then a gradual recovery and rise to greater levels of benefit, as shown in Figure 3-1.

The primary cause for this pattern is diminished attention by management once the project has been launched, and failure to rigorously maintain and update the knowledge base.

This trend also reflects the nature of the problems that knowledge management is designed to solve, the indirect training it provides to Level-1 agents, and the combination of short-term and long-term goals it is expected to achieve.

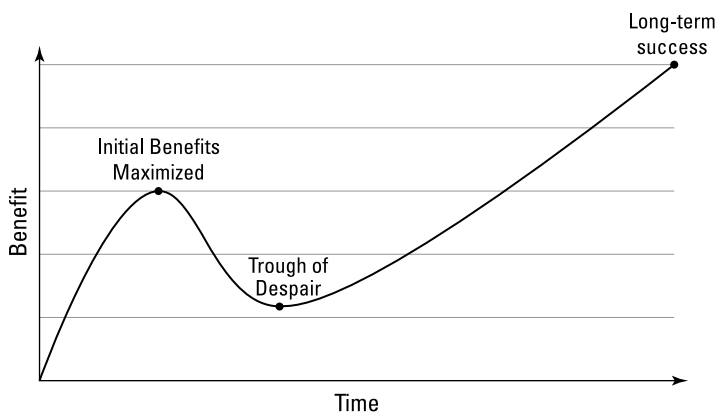


FIGURE 3-1: A typical experience with a knowledge management solution.

For example, in a contact center dealing with high turnover, with under-trained Level-1 agents and a chronic shortage of Level-2 agents to handle escalations, knowledge management will produce immediate short-term results that will be apparent after just a few weeks in the form of shorter hold times and call durations, lower call-back rates, fewer escalations, and an overall improvement in customer satisfaction.

Knowledge management will also yield long-term results, apparent after several quarters, in the form of shorter training cycles, more favorable customer-to-agent and Level-1 to Level-2 agent ratios and, in many cases, indirect results such as reduced churn.

In between the first blush of success and the realization of long-term goals, there is a period where short-term benefits are no longer increasing, and it is too soon to use long-term metrics. This is the region in Figure 3-1 labeled the “Trough of Despair.” This trough is usually characterized by a decline in system utilization rates. This may not be as alarming as it seems since it probably indicates that agents are improving in their ability to respond to customers. Nonetheless, under-utilization of any system is problematic, and this leads to the final factor in a successful knowledge management deployment: the need for long-term maintenance and change management.

There are several areas that require sustained attention in order to maximize the benefits of knowledge management, and some are more obvious than others. Overall, the most important

thing to do is to plan for expansion and change of the original knowledge base. Here are some ongoing activities that should be performed after your initial deployment:

- » **Managing routine updates:** The most obvious need for managing change has to do with routine updates required by the introduction of new products and services, as well as changes in existing products, services, or policies. There must be a simple and clearly understood procedure for making updates to the system. It is also important to routinely evaluate all knowledge items based on their creation and revision dates to make sure that they are still current. This should be a software-assisted effort.
- » **Refining the knowledge base:** Knowledge management ensures that all agents give the same responses to the same inquiries. Once consistency has been achieved, answers can be modified to further improve success rates. Modifying agent responses to specific customer complaints can yield significant return on investment (ROI).
- » **Expanding the scope:** As discussed earlier in this chapter, it is a good idea to get your knowledge management system up and running quickly with a limited scope. However, once your system is working, expanding its scope will increase its benefits.
- » **Creating personalized interfaces:** One of the key goals of knowledge management is to help Level-1 agents attain the capabilities of Level-2 agents. However, because knowledge systems do, in fact, train Level-1 agents as they provide service, a significant percentage actually become or almost become Level-2 agents. This gives rise to an interesting paradox: Level-1 agents need to use the system less, which leads to lower system utilization. One way to address this issue is to create a second interface for agents who are no longer beginners. However, there will always be Level-1 agents because of new or changed products, services, and policies, or the addition of new agents to the team.

The most important practice to ensure that enterprises succeed in any of the areas outlined above is to assign responsibility for long-term change management to one individual. Knowledge management systems can't run themselves. They will deliver maximum value only with sustained attention.



Modern knowledge management systems are adaptive. They automatically identify knowledge bottlenecks based on usage and user feedback — whether explicit or implicit — and generate alerts and create tasks with service levels, if needed, for appropriate content owners. This self-monitoring capability ensures that the knowledge implementation does not languish due to lack of maintenance.

A FEW BONUS TIPS FOR KNOWLEDGE MANAGEMENT SUCCESS

Here are a few more tips to help you succeed with your knowledge management initiative.

Technology (yes, it matters!)

While people, processes, and culture are all essential for KM success, technology matters in a big way as the world becomes increasingly digital-first, work-from-anywhere, and automated. The technology building blocks of modern KM include machine learning (ML) and artificial intelligence (AI) reasoning, infused across interactive voice response (IVR), routing, and customer service processes, as well as omnichannel content management, profiled access to content, search methods (including federated, faceted, and guided search), conversation guidance (next best thing to say), process guidance (next best thing to do), and analytics. For example, you can use ML to refine intent inference and AI reasoning to guide agents through customer conversations and for customer self-service.

Holistic view of value

Take a 360-degree view in assessing the value of knowledge, going beyond common measures. For example, unwarranted handset exchange is a big problem in telco. One eGain client was experiencing a high rate of exchanges, driving up their operational cost. They deployed eGain's KM solution and with conversational AI guidance, agents were able to better resolve the issue with customers. This reduced their handset exchange by 38 percent in the first six months, saving them millions of dollars in the process.

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Outside-in approach to knowledge creation

One of the common mistakes knowledge managers make is taking an inside-out approach to looking at what knowledge to create and deliver. The better approach is to see what questions customers are asking and focusing on answering them. The Pareto principle often applies here — 80 percent of customer queries can be answered by 20 percent of the content.

User buy-in and ongoing communication

Getting feedback from users on the user experience design and the quality of knowledge is critical. The KM initiative will be doomed without user adoption. Make sure to include successful and enthusiastic users as well as experienced skeptics. The latter are equally important due to their tenure and influence over other team members.

Gamification

Get the competitive juices flowing among your agents with gamification. Perhaps you could have a leader board for system usage, knowledge creation, knowledge sharing, and job performance. Forward-looking organizations, while recognizing performance, also give a considerable weight to other metrics such as knowledge usage and sharing. Modern KM makes agent gamification easy.

Push and pull knowledge

Knowledge was traditionally *pulled* on demand when the customer asked a question, whether through self-service or a contact center agent. Forward-looking organizations are now *pushing* knowledge at appropriate points in business processes to make them more effective and efficient. This applies to customer service, too. For example, eGain's Virtual Assistant for Agents monitors conversations and pushes tips and guidance in a proactive manner, all in real-time. It even enforces regulatory compliance by pushing knowledge (guiding them on the right thing to say and do) if the agent is out of line.

IN THIS CHAPTER

- » Exploring the capabilities and features of eGain Knowledge Hub
- » Getting started with eGain Knowledge Hub
- » Realizing the business benefits of eGain Knowledge Hub

Chapter 4

Delivering Fail-Safe Innovation with eGain Knowledge Management

This chapter goes over the eGain Knowledge Hub, which helps organizations consistently deliver quality customer service by infusing agents with knowledge and helping to make all your agents as productive as your best ones, while enabling “Wow!” self-service experiences for end-customers at the same time.

Discovering the eGain Knowledge Hub

eGain Knowledge Hub combines all the essential ingredients of modern knowledge management into one comprehensive solution with a unified approach. Together with eGain’s domain expertise and proven success, it transforms contact center operations. Among the benefits are improvements in:

- » Agent speed to competency
- » Net Promoter Score (NPS)
- » First-Contact Resolution (FCR)
- » Average Handle Time (AHT)
- » Self-service deflection
- » And much more



TIP

By providing agents and other users a wide range of ways to get to answers from a common knowledge base, eGain Knowledge Hub ensures fast, consistent, and accurate resolution.

The hub empowers both novice and expert agents to find answers easily and efficiently. The conversational guidance can be personalized to the expertise and/or performance level of the agent. For example:

- » A **novice agent** could go through an interactive Q&A session where the artificial intelligence (AI)-based guided help interface would handhold them to a resolution of the customer issue.
- » An **experienced agent** could use the browse-and-search access mode rather than the guided help interface.
- » The **knowledge administrator** can also selectively allow experienced and/or high-performance agents to use shorter resolution paths and also suggest knowledge.

One hub, many capabilities

eGain Knowledge Hub includes, unifies, and orchestrates the following capabilities for quick business value out of the box:

- » Omnichannel content management
- » Profiled access
- » Conversational guidance, powered by artificial intelligence (AI) reasoning
- » Generative AI, leveraging large language models
- » Interactive process flows
- » 360-degree context
- » Intent inference and insights, powered by machine learning (ML)

- » Personalized widgets and portals
- » Knowledge analytics

Integration with call tracking systems

The eGain Knowledge Hub, together with eGain's own or third-party call tracking application, speeds up the call setup and wrap-up process. The hub also includes pre-integrations with leading customer relationship management (CRM), Enterprise Content Management (ECM), and contact center systems. During call set up, interactive voice response (IVR) data can be captured to prepopulate questions so that the agent can get a running start on the issue-resolution process. Likewise, context from CRM systems can be leveraged to boot up knowledge search and trusted content in leading ECM systems can be federated from the hub.

After the call, the resolution transcript from the knowledge hub can be automatically saved in the call tracking or CRM system along with the service request. This results in speeding up wrap up and ensuring high-quality data for reporting and feedback, a great way to improve call center productivity.



TIP

eGain Knowledge Hub provides out-of-the-box pre-integrations with leading CRM, ECM, and contact center solutions including:

» CRM and DM/content management systems

- Salesforce
- Microsoft Dynamics CRM
- SAP
- ServiceNow
- Microsoft SharePoint
- Adobe Experience Manager
- IBM Lotus Notes

» Contact center solutions

- Amazon
- Avaya
- Cisco
- Five9
- Genesys

Quality content, maintained at low cost

Successful and effective knowledge management starts with quality content. Poor content — stale, irrelevant, or incorrect — results in customer dissatisfaction and quickly falls into agent disuse. eGain Knowledge Hub is based on a unique collaborative knowledge management framework. It allows distributed content creation and editorial workflow that enables collaborative, compliant, and cost-effective content creation, publication, and management.

Any user, based on roles set by the business, can easily suggest content in the application. The content is routed through efficient workflows to ensure consistency, quality, and compliance. This powerful flexibility allows companies to adapt to customer needs and behavior on the fly. Using self-organizing techniques, the eGain Knowledge Hub offers relevant answers to customer requests based on dynamic relevance ranking and user feedback.

Integration with third-party systems for knowledge reuse

eGain Knowledge Hub allows you to leverage or reuse existing content across your enterprise through the eGain Content Adapter. A powerful integration tool, eGain Content Adapter makes information from diverse sources — such as Microsoft SharePoint, IBM Lotus Notes, legacy content systems, and CRM systems — available in a consistent format to all your users, along with the knowledge within the eGain Knowledge Hub.



TIP

The eGain Content Adapter is compatible with over 100 file formats so that existing enterprise content can be easily leveraged in resolving customer issues. External content, or parts of it, can also be easily suggested as new content for the knowledge base. This tight integration further lowers the cost of maintaining and enhancing the knowledge base.

Powerful reporting and management features

The extensive reporting and management features in eGain Knowledge Hub measure agent and customer self-service effectiveness and guide knowledge improvement. Knowledge analytics enable you to incrementally enhance knowledge based on user feedback. Reports created from wrap-up data help to manage and plan

your contact center workforce training and staffing requirement. Finally, knowledge creation and maintenance reports allow you to easily set content contribution goals and usage-based incentives for employees and subject matter experts. The reports have built-in drilldown capabilities and can be exported for further analysis and presentation.

Global deployment with a scalable, multilingual solution

eGain Knowledge Hub can handle multilingual content. It supports localized interfaces in multiple languages. Also, the solution scales to handle several thousand concurrent agents in a distributed configuration. This gives a high level of flexibility to the organization.

The Unpilot Pilot from eGain

Imagine having the opportunity to buy a new car with an expert sitting by your side and providing free guidance for 30 days and still being able to walk away from the car. That is going beyond your traditional test drive and putting real skin in the game on the dealer's part.

eGain offers just that with a unique, no-charge production pilot — not just a sandbox or a traditional paid pilot — to try out any of its solutions, Knowledge Hub included, for 30 days, with guidance for success from an expert. The program is called “eGain Innovation in 30 Days.” The program is a four-week (wall-to-wall) guided innovation program that is safe, easy, and risk-free (see Figure 4-1).

A typical client can start leveraging knowledge within days. This disruptive offer includes:

- » eGain Knowledge Hub that includes built-in best practices
- » Safe production pilot in eGain Cloud enables participants to test alternative strategies and validate business use cases with actual results
- » Options for easy A/B testing

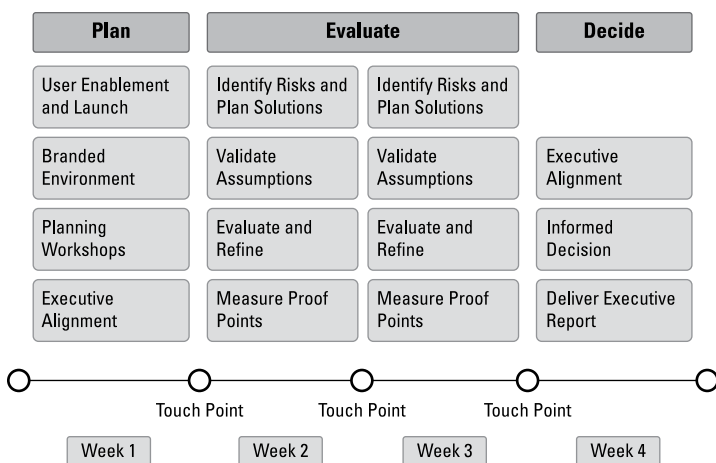


FIGURE 4-1: Delivering innovation in 30 days.

- » Guidance to quick business value by eGain experts including executive dashboard reports that connect business metrics to new capabilities and highlight ROI at scale
- » Risk-free delivery at no charge with no obligation to buy



TECHNICAL
STUFF

Systems of engagement deliver rapid innovation but must work with systems of record that are typically characterized by a robust, slow-changing cadence. Moreover, the two layers must interoperate through open interfaces — the engagement layer rapidly delivering innovative and differentiated capabilities, leveraging data and context from the systems of record that must remain rock solid. The knowledge hub lies in the engagement layer. It is so strategic that industry analysts are now advocating a dedicated layer for knowledge and insights for customer service innovation!

KNOWLEDGE-POWERED EX AND CX TRANSFORMATION AT MAMMOTH GOVERNMENT AGENCY



CASE STUDY

The federal government sector had scored the lowest in customer experience (CX) five years in a row, per the Forrester US CX Index 2018-2022. A big reason for dissatisfaction with government customer service is the inability to provide the right answer regardless of interaction channel. An eGain sponsored survey found that 57 percent of consumers reported getting different answers for the same question across touchpoints.

A large cabinet-level executive branch department of the U.S. federal government serving over 9 million customers was not immune to this trend.

The agency turned to the eGain Knowledge Hub for a modern, omnichannel knowledge management solution to help accelerate its digital transformation initiatives and deliver the single right answer to customer queries across touchpoints. The agency sought to address three primary goals:

- **Eliminate knowledge silos**
- **Build a single hub of trusted knowledge** including data, policies, procedures, and know-how
- **Deploy across touchpoints at scale** including portals, widgets, and embedded in process and workflows

Deploying eGain Knowledge Hub was a win-win-win for the agency:

- **Customers** gained easy, fast access to consistent answers across touchpoints
- The **agency** increased operating performance, improved its first-call rate (FCR) and reduced repeat contacts, improved trust in government, and achieved cost savings amid budget cuts

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- Frontline **agents** and other employees, tens of thousands of them, gained confidence in handling customer queries and became more productive, improving the employee experience (EX)

With the eGain Knowledge Hub, the agency achieved the following results:

- **30 percent** increase in knowledge creation in one calendar year
- **19 percent** increase in monthly visits to the knowledge management portal
- Forrester CX Index rating for the agency improved from **60.6 to 64.7**, considered significant in their assessment methodology

- » Delivering a knowledge-powered omnichannel experience
- » Leveraging chatbots for 24/7 assistance
- » Gaining deep insights with analytics
- » Innovating, extending, and integrating with a rich API library

Chapter 5

Ten Things to Look For In a Knowledge Management Solution and Provider

Here are ten important characteristics you should look for in a knowledge management system (KMS) and provider for your organization.

Modern User Experience Design

Clearly, the world has gone omnichannel, with omnichannel penetration of commerce at anywhere from 35 percent (healthcare) to 65 percent (consumer electronics.) And it's no secret that mobile is a big part of omnichannel.

To be effective, a KMS must deliver consistent and channel-tailored knowledge on any channel or device. It must support mobile, whether it is the mobile web with responsive design or an

app, and can bootstrap a human-assisted service conversation or an autonomous remote fix from device data.

At the same time, the modern user experience must be customized to individual agent and customer preferences. Finding accurate answers and getting to resolution is good, but the user's quest for answers can be full of twists and turns that can be very time consuming to work through. A successful KMS increases speed-to-answer by being hyper-relevant right from the start with personalized customer preferences, agent roles, and agent skills.



TIP

The KMS should be able to personalize for authenticated customers and anonymous prospects alike while making it easy to deliver accurate knowledge from the knowledge base.

One Knowledge Base

The best knowledge base software forms an integral part of a KMS. The software includes comprehensive features that support the creation, maintenance, and distribution of multilingual and omnichannel knowledge.

It provides easy access to answers through multiple search methods to users — customers, contact center agents, frontline staff, and even business stakeholders.

The enterprise knowledge base ensures that your customers receive timely, consistent, accurate knowledge across all channels and touchpoints.

Guided Experience

While an important business use of knowledge management is finding answers, a next-generation KMS can guide agents and customers through next-best steps in their conversations and processes. After all, today's millennial agents (and customers) are used to being guided in all aspects of life.



REMEMBER

According to a survey by Experian, the use of smartphone global positioning system (GPS) apps for driving is 26 percent higher for millennials than for boomers.

Smart knowledge management uses artificial intelligence (AI) to take guidance to the next level. AI-infused knowledge management can handhold agents through customer interactions based on organizational best practices and regulatory requirements for automated compliance. The output might be step-by-step guidance toward a customer goal like problem resolution or even a go/no-go decision. AI-led knowledge has many applications in customer engagement, from customer service to sales to even other functions in the enterprise.



WARNING

Don't be fooled by pretenders like rigid scripting and rule-based systems that claim guidance. They tend to put agents and customers in conversation cul-de-sacs, especially when the customer goes off-script (which isn't uncommon) and can't make midcourse adjustments to move the interaction towards the customer goal. These imposters are products of legacy systems that are difficult and expensive to maintain.

Intelligent Search

Can the KMS find accurate answers fast when the customer is on the line and the pressure is on?

Content often resides in unstructured formats, in disparate formal and informal sources — including customer relationship management (CRM) systems, content management systems, document management systems, social media, and online communities.

The best KMSs federate search, where appropriate, compiling information from multiple trusted sources so that relevant answers can be presented for a query. The system also helps to “harvest” answers from external systems and routes them for quality control and publishing as trusted knowledge.

Make sure your KMS makes findability easy with flexible search options so that users can pick the path to the answers they like. The contact center could also mandate the path, based on agents' tenure with the organization, past performance, and regulatory requirements in the case of human-assisted service. Examples of “find” paths include frequently asked questions (FAQs), keyword search, natural language search, federated search, topic tree browsing, instant answers leveraging large language models and

generative AI, and so on. Suffice it to say that the business value of content without fast findability is zero, or even negative if one were to look at the cost of content creation and maintenance, and time spent on futile searches.

Virtual Customer Assistance

A virtual assistant (VA) is a lifelike, conversational chatbot (sometimes called virtual agent) that provides a unique, interactive, and personal way for users to get answers and assistance through digital touchpoints, 24 hours a day, 7 days a week.

A customer simply chats with the VA like they would with any human agent. The virtual assistant not only understands the words but also the intent, thanks to a portfolio of AI technologies that include machine learning and reasoning.

The VA acts like a guide, helping customers navigate websites and taking them to the relevant place. The VA provides answers to customer queries, even helping them make decisions. At any point, and if the need arises, it can seamlessly escalate to agent-assisted channels like live chat or messaging.



TIP

eGain Virtual Assistant includes out-of-the-box avatars, multi-lingual natural language processing, machine learning capability, reasoning engine, knowledge base, and analytics for continuous improvement. Besides answering questions, it can push relevant web pages and take customers on website tours. In addition, it supports text-to-text, text-to-speech, speech-to-text, and speech-to-speech communication modes, and can be embedded in apps and other touchpoints.

Compliance

Staying compliant with government and industry regulations and enterprise best practices can be very challenging. Every business had to deal with this challenge when the world was hit by the COVID-19 pandemic. Customers went digital overnight and contact centers became hundreds of work-from-home centers.



WARNING

Around 70 percent of compliance professionals expect increased regulations, 59 percent expect increased personal liability, and 69 percent expect compliance staffing costs to rise.



TIP

A mature, AI-guided KMS enables your business to stay current with ever-changing industry regulations — particularly in highly regulated industries — whether it's for content, access, process, or interaction.

Integrations

Mature knowledge management tools tightly integrate with call-center infrastructure, CRM, and content management solutions so that knowledge search and guidance can be booted up with more context, trusted content easily federated, and customers and agents can get to accurate answers faster.



TIP

In addition to offering prebuilt connectors to leading systems of record, eGain Knowledge Hub leverages a unique BYO (Bring Your Own) composable architecture and allows the enterprise to use any bot, agent desktop, or other components in conjunction with eGain building blocks. In addition to being part of the eGain Agent Desktop, it can also be embedded in third-party desktops, where customer service reps can find fast, accurate answers for customer questions by simply clicking on a “Solve” tab or button. eGain Knowledge is boot-strapped with expanded context from third-party systems for speedy problem resolution.

Analytics

Measure to manage. Your knowledge management benefits should be quantifiable. Are the knowledge articles answering questions? Are they covering the most frequent topics of customer queries? Where are the bottlenecks?

When you have the insights, you can finetune your knowledge base quickly and frequently. Make changes to improve an article, make improvements in processes, tweak agent schedules, and improve operations.

Rich API Library

With a rich API library, eGain's capabilities can be extended, new capabilities created, and eGain can be integrated with any third-party system, where pre-built connectors are not available, to connect all the dots for seamless stakeholder experiences and expanded innovation.

Domain Expertise

While technology matters, make sure that the provider has domain experience in knowledge management in the context of your industry as well as a proven track record of success at scale. Do they offer rich functionality out of the box? Can they deliver quick value with best practices? It is risky to bet your initiative on unproven startups or toolkits that require months or years of coding and customization.

#1 AI Knowledge Cloud Platform

Agent Knowledge

Virtual Assistants for Agents

Customer Self-Service

Chatbots



Unleashing the value of knowledge management

Knowledge management, done right, can transform the entire business. Although customer service and engagement is an obvious use case for knowledge management, others include IT and human resources help desks, sales, legal, compliance, and many other functions across the enterprise. In this guide, you'll discover the "what" and "why" of knowledge management, how to get started with knowledge management, and how to choose a knowledge management solution and provider for your organization.

Inside...

- Reduce service costs
- Increase agent productivity
- Improve customer service and experience
- Enhance omnichannel consistency
- Ensure compliance
- Digitalize the contact center

eGain

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