



THE FIVE-POINT PLAN: HOW TO SUCCESSFULLY INTRODUCE KNOWLEDGE MANAGEMENT AT YOUR COMPANY

1. Find the right technology
2. Successfully deploy a knowledge management system
3. Get other departments involved
4. Provide knowledge to existing applications
5. Become a leader by transforming into an information-driven organization

CONTENTS

03

Introduction

06

STEP 1: Tough choices — finding the right software for your company

12

STEP 2: Knowledge management 101 — getting off to a successful start

20

STEP 3: Keep it rollin' — expanding knowledge management across the enterprise

24

STEP 4: Connecting knowledge — integrate into all contact channels

28

STEP 5: Omniscience as status quo — the evolution of knowledge management

30

Attachment: Practical checklists

Introduction

As the saying goes, you don't need to know everything, you just need to know where to look it up. That's easier said than done if you consider the massive amounts of information generated by a modern business. The quantity of information that we are exposed to at work corresponds to roughly 200 newspapers — every day. This endless searching for information grinds on employees. Outdated product datasheets are a concern for Sales and Marketing, service staff constantly have to make excuses to customers, and field service staff are forced to call in to the office far too often.

Do you know where all your company's knowledge is stored? Or where you should update something so that information remains up-to-date and other employees are able to find it?

A professional solution for knowledge management is the key to better structure and efficiency. Companies report that they are able to react to

customer inquiries 73 percent faster once they have deployed a professional knowledge management solution

But for many companies, creating a new software silo for knowledge management seems too resource-intensive. Can't the same thing be accomplished by tidying up the server or getting SharePoint running the way it should? That's a bit shortsighted — especially since knowledge management is not a silo, but rather a solution that can be fully integrated.

In this ebook, you'll find out how you can have a successful rollout, how to structure your knowledge, cleanse your data, and properly organize everything. Then expand the system and integrate it into all of your business processes.

NPS improved from -94 to 53

A Serveware project with one of the largest energy providers in Europe to replace the knowledge management system reduced search times by over 75 percent and increased employee productivity. A study among the employees showed that the net promoter score (NPS) — in other words, the rate of recommendation — increased with the new system from -94 to 53.

Sidebar: The evolution of knowledge management

To ensure that employees are able to make sound decisions in response to what are frequently very complex customer requests, professional knowledge management has become essential. Information that employees require for their work should be easy to find — on whatever device they choose, be it a PC or a smartphone.

One of the unique features of knowledge management solutions compared to other systems is that dedicated editors collect information and prepare it for the company.

They reject outdated information and present current information in a way that makes it easy to understand. They keep doing this work, day in and day out, ensuring that company knowledge stays up-to-date. Employees and customers are able to provide information and feedback at any time.

knowledge management solutions offer various approaches to submitting knowledge. Some systems allow entries without first setting up a structure, relying exclusively on search features for navigation. This often results in disorganized knowledge.

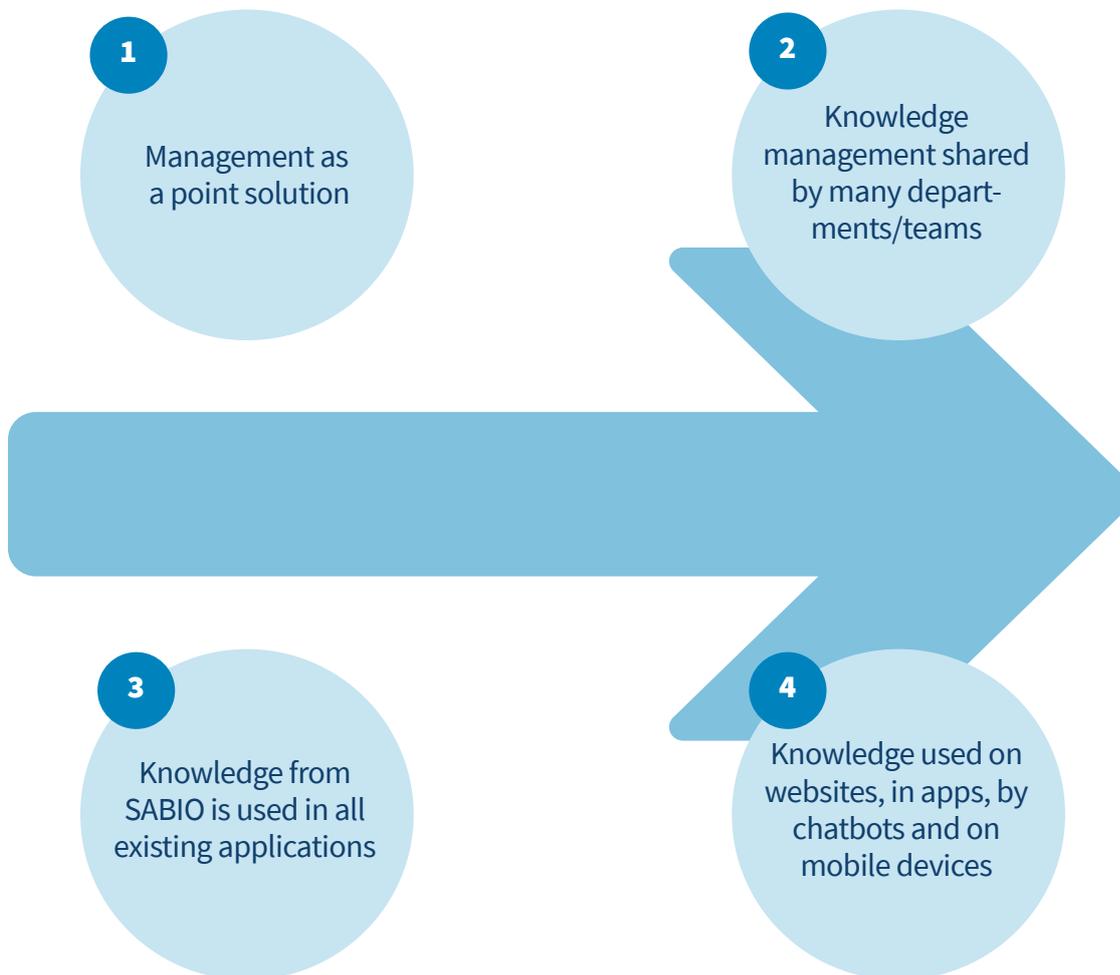
Other solutions require the knowledge to be structured and filtered in an initial step in addition to the integrated search functionality. This allows users to find their way around and get the information they seek faster.

knowledge management systems have progressed considerably in recent years. They have evolved from point solutions for accomplishing basic tasks into fully integrated systems that provide knowledge across all organizational units and all applications.



Serviceware Knowledge distinguishes between four levels of maturity:

1. Basic Knowledge: Management as a point solution
2. Collaboration: Knowledge management shared by many departments/teams
3. Integrated Use: Knowledge from Serviceware is used in all existing applications
4. Multiplied Use: Knowledge used on websites, in apps, by chatbots, and on mobile devices



Step 1:

Tough choices — Finding the right software for your company

There are certain aspects to consider before procuring a knowledge management system. The trick is to find the right features and good usability while keeping in mind acquisition and operating costs, support, and choosing a vendor that will still be around to support you with updates in the future. It's not easy to make the right choice because there

are so many knowledge management solutions on the market and other tools with a wide range of features. How do you find the right system? Which questions should you ask? And what should you do after you've made your choice?



A comparison: File servers, Wikis/SharePoint versus knowledge management

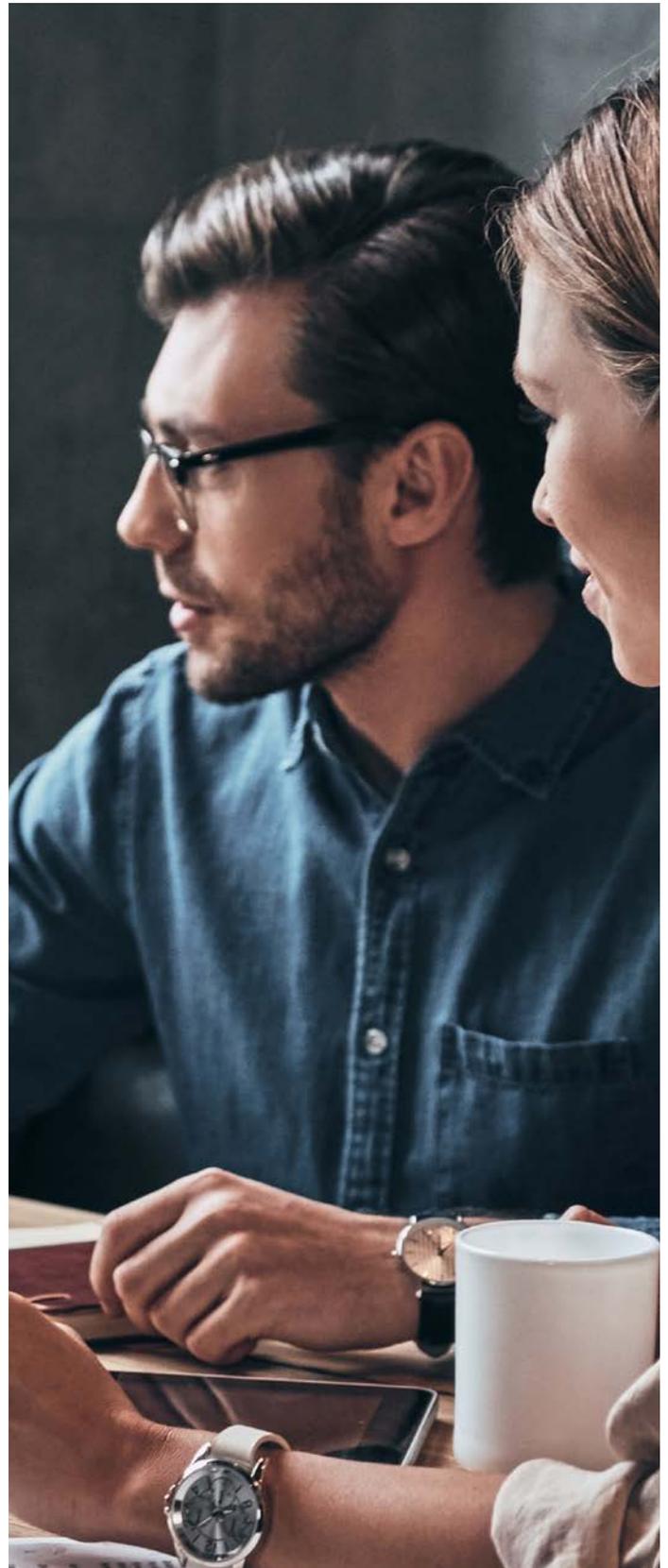
File server	Wikis/SharePoint	Professional knowledge management
The smallest solution to store knowledge.	Teams manage knowledge together.	Editors manage knowledge for business units.
<ul style="list-style-type: none"> ✓ Technology is usually available ✓ Easy navigation ✓ Some form of access control available 	<ul style="list-style-type: none"> ✓ Usually browser-based ✓ Scalable ✓ Often, entries can be tagged to improve search Role-based access and permissions 	<ul style="list-style-type: none"> ✓ Structure: A few editors write for everyone ✓ Search both text entries and attached documents ✓ Knowledge is safely stored ✓ Clear permissions and roles ✓ Tailored access for departments or special customers ✓ Integration into existing systems: CRM, website, FAQs, support ticket systems etc. ✓ Feedback and ratings possible ✓ Knowledge stays up-to-date
<ul style="list-style-type: none"> ✗ Poor search functionality (can't search inside documents) ✗ No versioning ✗ Often too much information in one file ✗ Access not available from all locations ✗ Often outdated server structure 	<ul style="list-style-type: none"> ✗ Collaboration without security ✗ Anyone can add information ✗ Knowledge difficult to verify ✗ Often highly complex ✗ High level of editorial resources required 	<ul style="list-style-type: none"> ✗ Requires discipline from all users and editors ✗ Editorial resources required in the form of knowledge managers

Managing requirements

Clearly stipulating your requirements is the first step towards success. The best thing is to work with your stakeholders to determine which knowledge is required and how the processes currently work. What can you do better? Software for knowledge management is a tool that should greatly simplify people's work.

Specify your requirements as clearly and thoroughly as possible (for instance by generating a requirements specification document), because small details often determine how successful a software deployment is. The following essential information is required:

- › A process description that includes the expected results
- › Participating departments
- › Definitions of roles
- › Software functionalities weighted according to relevance
- › Any necessary consulting, training or support
- › The required quantities (of user licenses etc.)



The path to a shortlist

After you've determined your requirements, we recommend putting together a long list of knowledge management software vendors who are capable of meeting your requirements. Software evaluation platforms such as Capterra, G2crowd, and TrustPilot as well as a good old internet search for knowledge management solutions can be helpful here. Many software vendors describe features, interfaces, and special capabilities of their software in detail on their websites or offer free trials and demo versions. They will give you a good idea of the software's capabilities.

The first checklist will ideally include simple yes/no criteria. This makes it easier to research. The checklist should include the following questions:

- › Is the solution available as SaaS (software as a service) or only as an on-premise solution I need to install on my own servers?
- › Are there interfaces to specific software applications my company uses (CRM, helpdesk, etc.)?
- › Does the vendor offer training? Is online help available?
- › Is the software scalable?



RFW yes or no?

To further narrow down your selection, request quotations from the vendors or look at setting up a bidding process with your purchasing department. Free trial versions are often a good way to get a look at the software before you buy. Many systems such as Serviceware Knowledge will let you get a test installation up and running yourself. The test version should provide a brief introduction and give you an opportunity to try out key features.

If you are planning on calling for bids on a knowledge management system, work together with your procurement department to create a list of questions (such as a requirements specification) and consider in advance how you will rate the answers to ensure the ability to compare offers.

Total cost of ownership (TCO) – Are free solutions an alternative?

Some vendors offer free software that makes it easy to get started. These often consist of a light version that only includes limited functionality. Be sure to consider in your decision-making process that free software can involve higher costs in the end than paid solutions. You should look at the decision from a total cost perspective and consider the following factors:

- › Acquisition or rental of software and potentially-new hardware
- › Operating costs
- › Training

- › Support and updates
- › Custom modifications
- › Downtime
- › Time savings resulting from smart features etc.

With the holistic qualitative overview, you are able to better estimate any opportunity costs. If you decide on the wrong solution, you will lose time and money for instance if you notice too late that the respective system does not have integrations to existing systems and at your company or is not capable of precisely structuring your knowledge.

Step 2:

Knowledge management 101 — Getting off to a successful start

You've taken the first step and decided on a knowledge management solution. But what should you do next? Choosing a knowledge management solution is half the battle. But the bigger challenge is managing the change process within your organization.

In this chapter, you'll learn how to successfully execute your knowledge management project, find the right structure for your information, collect content for your editors, and subsequently prepare that content so that integrating it into a variety of business processes and applications pays off later.



In **Step 2**, we will show you how to properly structure your knowledge and cleanse your data.

Short and sweet: Deploying a Serviceware Knowledge management system is this easy

Sure, knowledge management is an investment. Especially when considering the initial preparation of existing information. But it's an investment that pays off quickly. From the technical perspective, knowledge management is easy to master because it's available as a SaaS (software as a service) or on-premise solution. You can basically get started immediately — with guaranteed availability, data protection, and cost visibility. In addition, the knowledge management solution can be integrated into your existing infrastructure — that allows you to automatically display context-based data from the knowledge

management system in your other applications. Good resource planning is required to get off to a good start. Good vendors will be able to assist you with professional consultation.

At Serviceware, experts accompany customers from start to finish throughout the entire project — tailored to the requirements of each customer, whether that means providing best practice workshops and training sessions on site or Serviceware Academy workshops and webinars.



A good knowledge management solution vendor will ideally offer you and your team consultation to support your activities during this phase.

Phase I – Introduction

Collect existing knowledge and structure in a way that every employee is able to easily find the knowledge they seek by using an intuitive navigation tree. Your Serveware consultants will assist you with the implementation and provide support so that your knowledge management system meets expectations.

Phase II – Expansion

In this phase, you demonstrate the benefits of your new knowledge management solution to other departments. Your presentation of the system will be more compelling if it has been organized in a clear and comprehensible manner during the introductory phase.

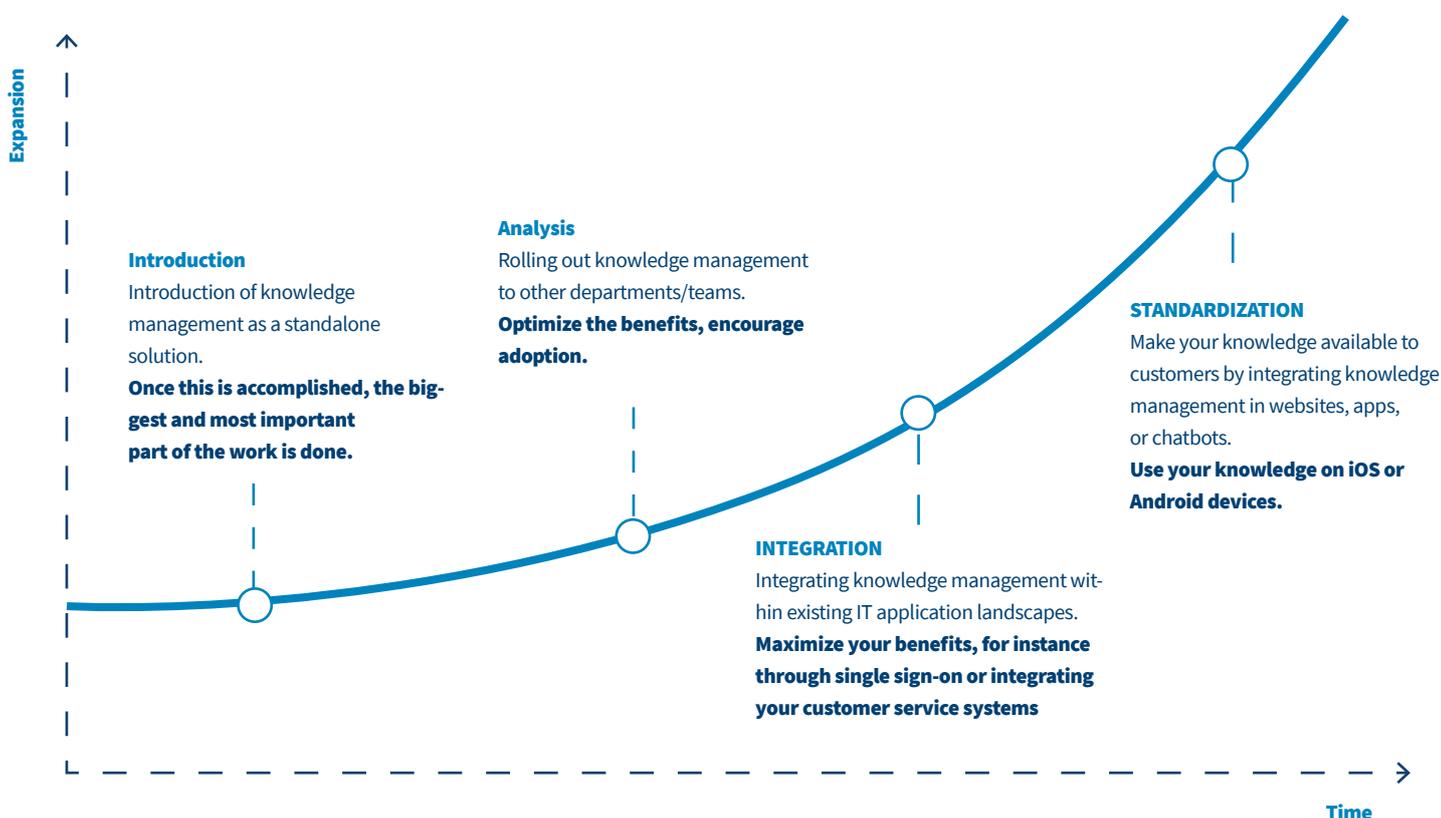
Phase III – Integration

To ensure you're getting the most out of your new knowledge management solution and that you're eliminating the knowledge silos that point solutions can create, integrate your knowledge management system into your existing software architecture. Serveware Knowledge for instance offers a REST

API as a dedicated interface to your systems to enable simple and seamless integration.

Phase IV – Standardization

You've deployed your knowledge management tool. The content is current and being updated on a regular basis. Find information on desktop PCs or mobile apps or use it to offer a perfect customer experience on your website.



SUCCESSFUL PROJECT SETUP

A knowledge management project usually involves three main aspects: Technology, organization, and communication.

Technology

Many companies now choose a SaaS (software as a service) solution, which is hosted by the software vendor and involves issuing licenses for the required number of users. Many vendors also offer on-premise versions in the event that your IT department requires it. What has become clear today is that it's generally faster to implement a SaaS solution because the vendor can provide a system that's instantly ready-to-go.

Organization

To properly organize the deployment of a knowledge management system, you should set up a project that includes project managers, IT specialists, and domain experts.

The size of the team depends on the scope of the project. Make sure to provide each team member with sufficient resources to work on the project so that they are not under time pressure or begin to perceive knowledge management as burdensome extra work.

Communication

It's also important that, early in the process, you acquire evangelists within the company and that you get staff involved, inform them of changes, and train them.

You can introduce the knowledge management system in 10 steps, which you can tailor to your needs.

1. Strategy

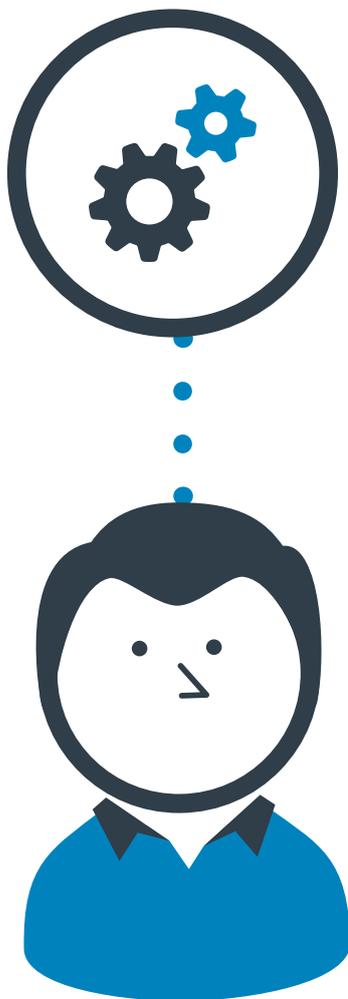
Meet with your colleagues to specify together the knowledge you wish to manage with Serviceware Knowledge, and what you'll leave out.

2. Structure

Brainstorm all the keywords that are important to you and collect them to get an overview. Also start considering how to structure your knowledge. Keep it short and be as precise as possible. Make sure to avoid keywords like „other,“ „general,“ or „miscellaneous.“ You're trying to ensure that finding knowledge will be an intuitive process for all employees in the future.

Serviceware side note: The right way to structure knowledge

As an initial step, analyze your existing knowledge by posing the questions below. You can do this as part of a workshop conducted in co-operation with a consultant, or as a separate process. Invite future knowledge management editors and departmental staff. We recommend you structure knowledge in the way that your customers experience your business. With a mobile phone contract, the customer journey starts with the plan and extends through the offer and cancellation. Keep the structure as simple as possible. You'll notice that the devil is in the details.



Gather knowledge

- › Where do we currently keep company knowledge (inside tools, files, or minds)?
- › Which parts of our business have the largest collections of knowledge?
- › Which type of knowledge do we currently have (implicit vs. explicit)?

Centralize knowledge

- › Who maintains which information, and how?
- › Is it possible to consolidate knowledge maintenance within a single tool?
- › Who urgently needs to document specialized knowledge in this solution?

Segment knowledge

- › Which segments require knowledge management (examples: teams, departments, products, processes, working groups)?
- › What information is in demand across the board?
- › Which knowledge is only needed by specific target groups (so that you can later generate views).
- › Which tags and keywords can we add to our knowledge content?

After these preparations, structure your knowledge management



Have the departments write down all the terms that are important to the company's departments.

Now collect and cluster these terms. The best way to accomplish this is to create a project team with one or two employees from your departments and book a conference room with a pinboard — then you're ready to go.

In the last step, sort these terms according to their priority and order. Make sure to keep your structure brief and not to use any terms such as „Other“ or „General.“ Once you have determined the order, you can adopt this structure inside your Serviceware Knowledge management system.

After these preparations, structure your knowledge management

1. Conduct a workshop with your team to set up the basic structure.
2. Do not create more than 8 to 10 entries per level and no more than six sub levels to make it easy to navigate from the starting point to detailed information.
3. Always place the most important information at the top.

3. Organization

Determine roles and permissions for your users. Who is allowed to edit knowledge, and who should be permitted to see what? After that, specify user groups. A knowledge management system typically has these three user types:

administrators, editors, and users. Set up customized screens for international subsidiaries, departments, or divisions and configure the system so that users only see the information that's relevant to them. A subsidiary in France, for instance, will only see information relevant to their own teams while the parent company in the UK manages the basic information that is available to all groups.

4. Training editors

Add the editors to the knowledge management system first and train them. Lots of knowledge management vendors offer workshops for editors and administrators.

5. Gather knowledge

Fill your knowledge management system with the keyword structure that you developed in Step 2.

6. Templates

Develop a style guide and templates before the editors start writing. Many systems come with templates that you can use and customize. Put all the primary information in a text that is generated

according to the specifications of a style guide. You can attach supplementary information within documents to a text via drag and drop (PDFs, Excel files, and more).

7. Editorial team

Now it's time to start adding knowledge to the system. Give your editors sufficient time as well as a specific time period with milestones during which everyone can add their content to the system. Pro tip: Many systems allow you to set expiration dates on knowledge. This content will expire after a certain amount of time, allowing you to review and update it at that point.

8. Training for administrators

Train your administrators. They need to know your knowledge management system inside and out. They are the ones who will respond to employee questions with tips and advice.

9. Quality check

Go through the system's settings one more time. Is everything how you want it? Do the texts adhere to the style guide?

10. Training the users

Train the users and remind your staff that they can submit suggestions and ratings at any time. In the beginning, feedback on the texts is particularly helpful for improving information quality.

Change management — Successfully instituting change

The introduction of a knowledge management system requires change management. You should initiate this as early in the project as possible. When new software is introduced, employees want to know whether the new tool is simply going to generate more work or actually help them accom-

plish their day-to-day tasks. Since a new knowledge management system involves introducing new processes such as editorial workflows and approval processes for knowledge content, change management is a topic that should not be ignored.





Announce the introduction of the software ahead of time using email, workshops, or internal social media platforms. Explain as clearly as possible what it is about. A FAQ page can provide quick answers to the most common questions.

- › Be very clear, manage expectations, and stick to the schedule.
- › Send out a training video around early on. Ideally, your employees will be looking forward to the software.
- › Offer training to those who are interested even before the rollout. These are the people who will become your evangelists.
- › Present the (new) knowledge structure to employees and send out status updates from the project team to keep employees in the loop. Conduct a pilot project if necessary — the participants will normally become advocates for the system.

- › Offer your employees seminars on knowledge management before the rollout to ensure they approach the new solution with an open mind.
- › Make important information available exclusively within the knowledge management solutions so that users get accustomed to it quickly.
- › Encourage users to adopt the new processes and motivate them to submit evaluations, feedback, and comments on the submitted knowledge.

This initial knowledge work is essential to ensure staff get started using the system quickly. The system is flexible, allowing you to expand and adapt your knowledge management processes at any time. Find out how easy that is in the next chapter.

Step 3:

Keep it rollin' — Expanding knowledge management throughout the enterprise

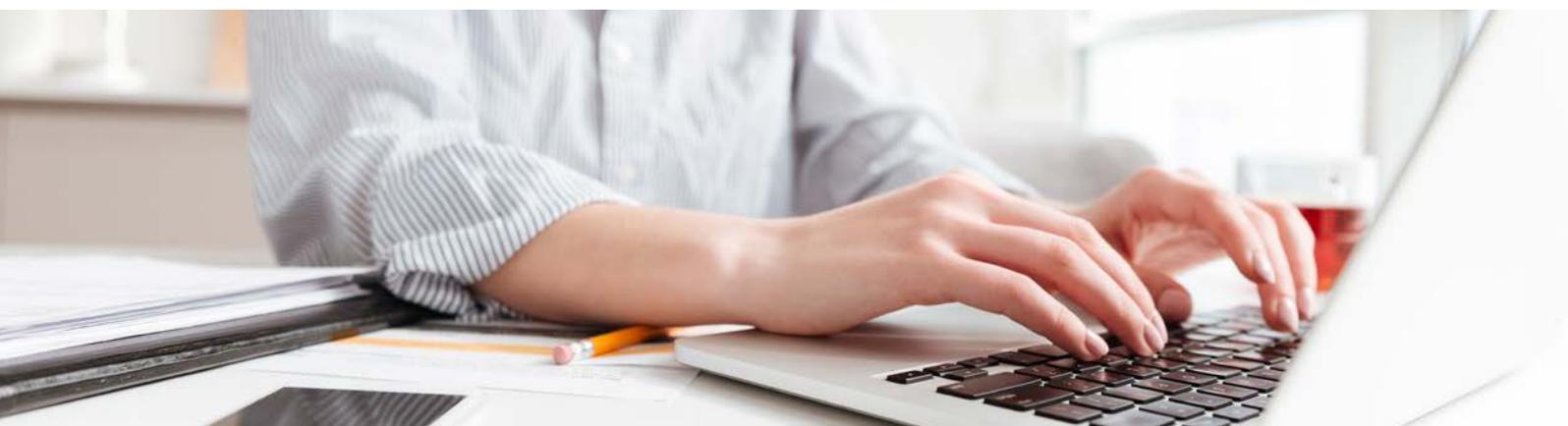
Exchanging knowledge is a normal part of daily work at an enterprise. Frequently, an employee's coworkers aren't sitting in the office next door, but on the other side of the country. Important information gets exchanged from coast to coast, frequently within interdisciplinary teams, on tight deadlines. In cases like these, it would be nice if everyone within the company had access to a shared pool of knowledge instead of storing company information in separate locations.

Expanding knowledge management to encompass the entire enterprise is more important now than ever. Once this process has been successfully initiated, a knowledge management system is easy to expand across other parts of the company such as new departments or international subsidiaries. So, why not establish knowledge management across other teams too, such as your on-site technical service staff? You can give technicians access to

manuals, drawings, process descriptions, and videos on their mobile devices, wherever they happen to be. Or use properly managed knowledge to get new sales staff up to speed faster and ensure they always have the latest marketing materials at their fingertips?

Doing the rollout the right way

Normally, people in your company will know when a department starts using a dedicated knowledge management system. Perhaps managers of other departments have even expressed interest. The positive atmosphere makes expanding the knowledge management system far easier because everybody is pulling together. Below are some tips on how to approach the rollout.



› **Internal marketing**

If you are a senior executive or board member, report internally about the success of the knowledge management system in one department or division. Offer interested departments an initial introductory workshop. You may wish to approach the departmental managers directly. Tell them how you went about deploying the knowledge management system.

› **Reputation and evangelists**

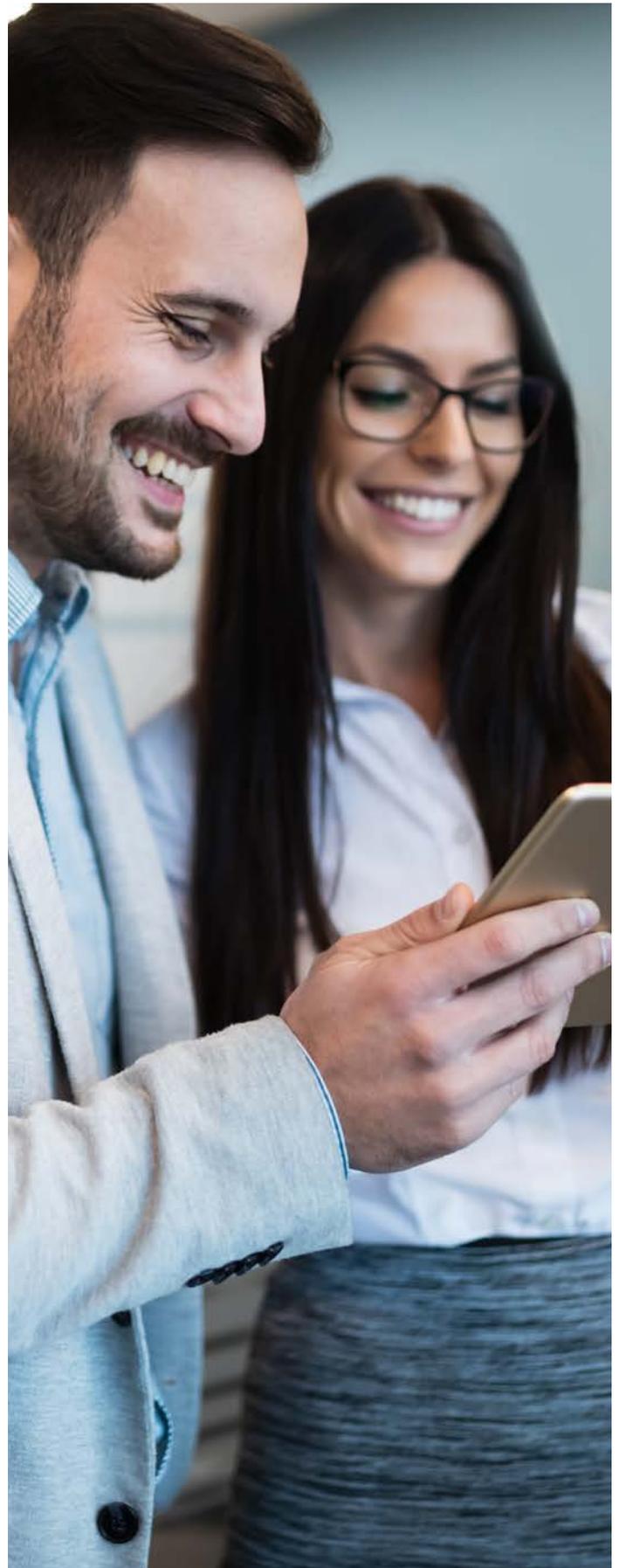
Invite influencers from other departments or divisions to have a look at the knowledge management system. Sometimes international subsidiaries have a vague idea of what's happening in other parts of the organization, but don't know what the current best practices are. Get evangelists among your users to show how they are using the new system. Identify and support internal stakeholders such as key users. These individuals are often very committed since they made a contribution to the project and also feel that its success is due in part to their own efforts.

› **Project manager**

The project manager coordinates all the videos and ensures the project progresses smoothly. If the project manager is new to the project, it may be advisable to give them a knowledgeable editor or administrator from your own department who is familiar with the system and can support them.

› **Workshops**

Employee training is also required for system expansion. It makes sense to use the same workshops that were conducted during the rollout so that everybody is on the same page.



Sidebar: suitable applications for knowledge management



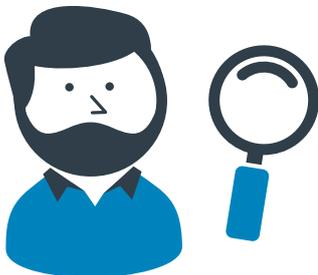
Field service

Field service in particular stands to benefit from enterprise-wide knowledge management. Process instructions, design drawings, step by-step troubleshooting guides, and manuals are always available on the user's smartphone or tablet. This way, there is never a lack of knowledge when staff are on-site visiting customers.



Sales and marketing

Particularly in sales and marketing, it's important to have quick access to information such as current price lists, presentations, and fact sheets. With the right knowledge management system, your sales employees will always find the latest documents.



Human resources

Knowledge management is also helpful for managing personnel. Information is gathered at a central location and then distributed, taking into account regional considerations such as collective bargaining agreements and the laws of the respective country. An additional advantage is that onboarding new employees becomes much simpler. All the relevant information is always up-to-date and available.



Customer service

Employees at service centers require competent training in customer consultation and service as well as comprehensive knowledge of the company's latest solutions, prices, and service policies. A seamlessly implemented knowledge management solution makes it possible to provide rapid and, crucially, correct answers to customer inquiries. By integrating existing service center applications, employees receive information right in the corresponding contact channel.

Expanding Knowledge management – We have liftoff



When additional departments start using knowledge management, they benefit from the experiences and best practices gained from the pilot project. The structure of the existing „knowledge tree“ is easy to adapt and re-use. Templates with editorial guidelines for texts and documents are available and usually still applicable. Processes for editorial workflows have been

established and it's easy to perform whatever updates the content requires. The success of a knowledge management solution depends on these updates and the discipline needed to keep everything current. Once people have internalized the process, knowledge will stay up-to-date. The entire organization and all its departments benefits.

Step 4:

Connecting knowledge — Integrate across all contact channels

How to integrate organizational knowledge

Your knowledge management system is now up and running: editors are submitting new knowledge content on a regular basis, updating information, and answering questions for all your departments. One of the main strengths of knowledge management solutions, however, is integrating knowledge content into other systems within the enterprise. Important information is maintained in a central repository and then distributed to wherever it is required. In this chapter you will find out how you can integrate your knowledge into other IT systems after you have rolled out the system and expanded it to include other parts of the organization. Keeping knowledge from being locked away

in silos presents a challenge to service-oriented companies. With integrations such as the consumer API from Serviceware Knowledge, organizational knowledge can be consistently maintained and targeted towards the needs of customers. You can, for instance, set up a help center for customers or integrate FAQs into your service app. Reports give you insights into the search preferences of your customers or how customers rate the quality of your content.

Integration as a competitive advantage

By integrating knowledge into the company's system landscape, service employees who mainly communicate with customers using a ticketing system or CRM are able to access content directly. Sup-



plemented with additional information, context can be generated in order to limit the potential quantity of knowledge considerably.

That's why the knowledge management system is integrated into the interface of the support ticket or CRM system. For integration with chat systems, content is directly transmitted to the systems. This way, chat agents can use the content seamlessly. Wouldn't it be great if simple customer inquiries could be avoided with targeted web FAQs and self-service areas, allowing customers to help themselves without having to wait on hold?

Here's an example. A European parcel service outputs information from the Serviceware Knowledge management system directly into their customer app.

Whenever a customer has a question during the order process, they can view the FAQs and the app, which provides context-based answers to the most common questions such as „how

heavy can my parcel be?“ These answers have been entered by editors into the knowledge management system, which also provides detailed answers for service center employees. If information changes, it is updated for both employees and customers.

The advantage of integration

- › A shared pool of data to maintain centralized information via the knowledge management system
- › Faster processing times and increased productivity
- › Efficiency increases across the organization, time savings
- › Knowledge is available everywhere it is required when it is distributed to multiple channels via interfaces
- › Costs for IT operations fall while flexibility increases

Innovative Artificial intelligence uses SABIO

With quantities of data increasing, knowledge management is becoming a key driver of innovation. Applications based on artificial intelligence (AI) and machine learning are making a significant contribution to this. Serviceware offers a range of AI-based solutions that enable companies to build a comprehensive and communicative self-service. Great support for

self-service is provided by the AI-based solution bot, which assists customers in a guided conversational dialog or with answers based on free-text input.

Why intergration is so important

Integrating software systems normally takes up a significant amount of time, particularly for the IT organization and the respective department. Consequently, integration projects are often de-prioritized. This is frequently a mistake because it results in unproductive data silos and employees who cannot access the knowledge they require. This can hobble an enterprise, preventing growth and resulting in dissatisfied customers. Companies with software silos have a number of challenges to deal with.

- › The numerous systems and versions are expensive to operate and maintain.
- › Employees are often unable to react immediately. The many overlapping programs provide neither a clear source of information nor do they offer transparency.
- › The productivity of employees decreases and the hodgepodge of programs is crippling. Efficiency suffers, mistakes are frequent and the pace of work slows.
- › Software should instead support the growing business over the long term. And it can only do that when it's used efficiently.

Start small, come out on top

Knowledge management systems are normally not yet completely integrated when they go live. The reason is that consolidating existing sources of knowledge should be the first step taken to create a reliable source of knowledge. Once this first step has been taken, integration with, for instance, a CRM application, support ticket system, or external systems such as self-services, FAQs, or chat solutions can be established as required using flexible and open interfaces.

In this way, knowledge management supports the company's long-term development. So make sure when developing your knowledge management system that your company knowledge is and remains usable in a variety of ways.

Sidebar: Knowledge connects — Serviceware’s integrations at a glance

You can easily integrate your knowledge management system into your system landscape. Here are just a few of the ways you can use Serviceware Knowledge with existing applications.

- › Integrations with chat software such as optimize-it
- › Automated customer communications with Sematell
- › IT service management with helpLine
- › Ticket systems such as Zendesk & Freshdesk
- › The Salesforce Service Cloud

- › Additional applications for web self-service, social media service, and live engagement
- › Or company-specific integrations via the documented REST API.

For more integrations, visit our website. If you have any questions or are interested, just let us know.

Now we’ve covered most aspects of knowledge management. In the following chapter, we’ll take you through optimizing operations, which is of great importance.



Step 5:

Omniscience as status quo — the evolution of knowledge management

The positive effects of knowledge management quickly become apparent once a system has been deployed. Fewer customers call the service hotline, for instance, because they are finding answers online instead. Or your field service gets higher ratings because they have access to all the manuals on their tablets. That's fantastic, but no reason to rest on your laurels. Because knowledge management is a process that offers benefits on a daily basis and therefore should be continuously monitored and optimized. We show you which methods help keep your knowledge management system up to date.

Deriving valuable information from content

Take a moment after the rollout and then at regular intervals to analyze your knowledge. Most knowledge management systems generate reports that offer insights into how content is being used. Feedback can identify trending topics that maybe of interest to the development department as valuable market signals. Or it may be that your ERP system does a good job at providing sales figures for a product, but your service team is frequently accessing the product manual. This may be an indication that customers have too many questions and it's time to work on the product's ergonomics. The reports give you insights into whether employees require additional training or which qualifications new employees should possess.

The philosophy — Keep it simple

Of course you should take the corresponding time during the introduction to set up your knowledge management system with a clear and simple structure.

And it should stay that way over the coming years— From a technological perspective, many knowledge management vendors rely on standards and proven partnerships to ensure customers can deploy and operate their systems without consuming large amounts of resources.

Even in the event of required updates, everything runs smoothly with Serviceware Knowledge — whether they are updates of the knowledge management software itself or the customer applications it interfaces with.

But particularly with respect to content, you should specify a few standards and processes from the beginning. Below are a few tips for keeping your system in order during daily operations. In the day-to-day work at your company, new topics will appear on a regular basis. Naturally, you'll want to keep your knowledge management system up-to-date. You can also use feedback from colleagues to surface desired changes. Then adapt the structure immediately or wait and conduct a quality workshop — and don't hesitate to get assistance from your consultant.

- › The content should also be easy to understand and well-founded, which can sometimes fall by the wayside when new editors follow their own methods. So be sure to create a style guide and templates for editors to adhere to. Lots of knowledge management suppliers will train your team at the beginning of a project and give your in-house instructors the information they need to train new hires. That helps onboard new employees and get them up to speed fast. But it's often a good idea to have the vendor provide a corresponding training session. Serviceware for instance offers regular training sessions with its academy courses for editors and administrators who are new at the company or are looking for a refresher course.
- › Conduct a quality workshop whenever the knowledge management system has been in operation for a longer period of time. You can also conduct this workshop with consultants who will give the system a thorough going over. The objective of quality workshops is to determine whether the specified quality standards have been met, the templates are still current, and style guides have been adhered to.
- › You may consider whether it makes sense to appoint designated knowledge managers for your company or even put together a central editorial team instead of letting each department write their own entries. At large corporations, a central editorial staff has many advantages over assigning these tasks to people in the departments.

The advantages of a central editorial team

One question you should ask when it comes to the quality of the content has an impact on whether you choose central or decentral editing.

With decentralized editorial staff, your departments or designated employees within those departments will author the texts for the knowledge management system themselves. One common disadvantage here is that these employees have a lot of work to do and little experience with editing.

Knowledge work can get placed on the back burner or be regarded as extra work.

With a central editorial team, employees who have backgrounds in journalism process all the knowledge for the entire company.

The departments deliver the information and

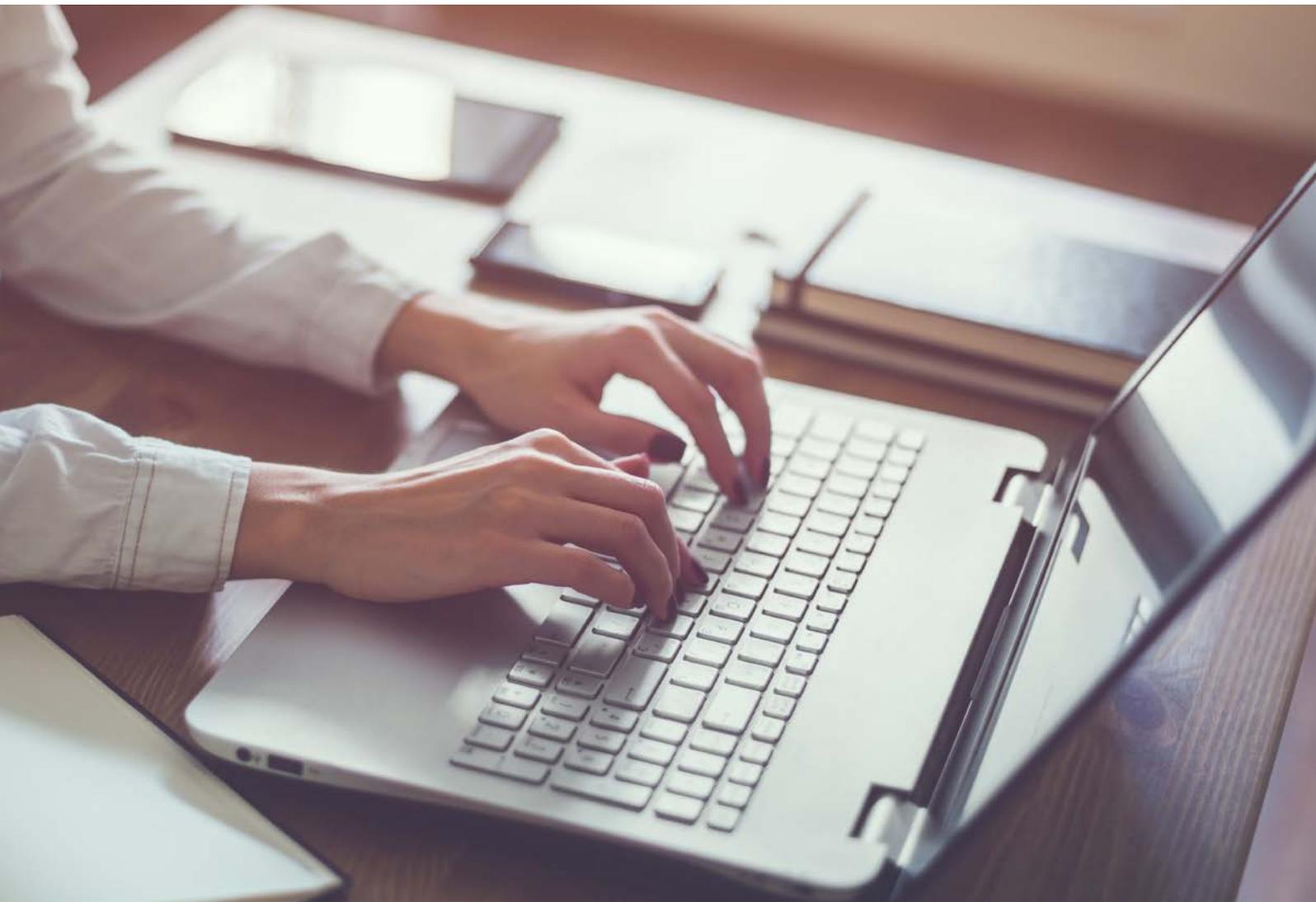
technical texts. The editorial team then enters these texts into the knowledge management system while ensuring adherence to style guides. Then they obtain approvals from the departments for these texts through the system's approval process. An advantage for large companies is that knowledge remains consistent, and knowledge managers can concentrate solely on keeping their texts and documents up-to-date.

As you can see, the positive effects of knowledge management become apparent quickly. With a bit of discipline, it's quite easy to ensure high quality day-in and day-out.

Attachement: Practical checklists

Five steps to get started with knowledge management

1. Deployment workshop with best practice examples
2. Design and configuration in collaboration with the company's departments
3. Optimize the structure and test
4. Train editors and administrators (permissions, roles, and views), subsequent population of the system with information
5. Rollout — In just 30 minutes, everyone knows how knowledge management works



Checklist:

Selecting the right software

Forward compatibility

- › How long has this vendor been around?
- › Is it a growing company, are they economically successful, and what does the team look like?
- › How is this vendor improving its knowledge management solution? Are there new options such as apps for smart phones and tablets?
- › Are there regular updates?

Technology

- › Can the knowledge management solution be integrated, are there standard APIs and apps?
- › How is the software provisioned (SaaS or on-premise)?
- › What are the software's requirements with respect to operating system, memory, and processing power?
- › Is the solution scalable? Can the solution provide additional benefits to your company at a later date, for instance via add ons?
- › Are there any other benefits? (Additional add-ons)
- › Are there good backup and restore options?

Experience

- › How many customers and references does the vendor have?
- › Does the software maker know your industry?

Checklist: Selecting the right software

Costs

- › Is the cost acceptable relative to the quality of the features?
- › Is a free test version available?
- › Am I getting a customized solution?
- › Can the solution be expanded later for instance through additional features, integrations, and add-ons?

Usability

- › Can users quickly get the hang of things?
- › Are there online onboarding or training workshops?
- › Are there good search features and dashboards?
- › Is good documentation with online support available?



Checklist:

10 steps to get your knowledge management system up and running

1. Get together with your colleagues and figure out what knowledge you want to manage with Serviceware Knowledge and what you'll choose to leave out. These are your fundamental strategic decisions. Structure the knowledge.
2. Collect all the topics and put them into a mind map.
3. Specify roles and permissions for your users. Who is allowed to edit knowledge, and who should be permitted to see what? After that, specify user groups.
4. Add your first users — the editors are a good place to start — and train them.
5. Fill Serviceware Knowledge using the mind map from Step 2. Now your knowledge tree is growing.
6. Develop a style guide and templates before the editors start writing.
7. The editors add content to the system according to a plan that includes milestones.
8. Train your administrators. They need to know Serviceware Knowledge inside and out.
9. Go through the system's settings. Is everything the way you want it?
10. Train the users and don't forget to mention that it's important to submit suggestions and reviews.

Congratulations — Your knowledge management system is live.

Would you like to talk to the people behind this ebook? Just give us a call, we'd love to hear from you.



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About Serviceware

Serviceware is a leading provider of software solutions for the digitalisation and automation of service processes (Enterprise Service Management) with which companies can increase their service quality and manage their service costs efficiently.

The Serviceware Platform includes the software solutions Serviceware Processes, Serviceware Financial, Serviceware Resources, Serviceware Knowledge and Serviceware Performance. All solutions can be used in an integrated manner, but also independently from one another.

Serviceware partners with customers from strategic consulting through the definition of the service strategy to the implementation of the Enterprise Service Platform. Further components of the portfolio are safe and reliable infrastructure solutions as well as Managed Services.

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