

# KCS 1 - Candidate



APOLLO GROUP<sup>SM</sup>  
LEARNING & ORGANIZATIONAL DEVELOPMENT

## Detailed Design Document

Date: 4/15/14

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Overview

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Course, Module, Lesson	<b>KCS 1 - Candidate</b>
Time and Topics	
Business Goal(s)	Knowledge base and knowledge base management are tools and processes that are being implemented in many parts of our organization by the Enterprise Knowledge Management (EKM) team. ALOD is partnering with this group to roll out standardized, consistent training for End Users of the knowledge base and people who manage the knowledge base using the KCS methodology.
Performance Outcome(s)	By the end of this session, participants will be able to <ul style="list-style-type: none"> <li>▪ Recall KCS concepts, components, and roles</li> <li>▪ Summarize the KCS 1 Candidate role</li> <li>▪ Identify the practices in the Double Loop process</li> <li>▪ Recognize article quality components</li> <li>▪ Determine when to flag or suggest changes to an existing article</li> <li>▪ Recognize when to create a new knowledge article</li> </ul>
Project Manager	Amanda Stricklen
Learning Consultant	Elisa Eiler
Designer	Jennifer Springer
Target Audience	All roles
Min/Max # of Learners/Event	n/a
Prerequisite Skills(s)	N/a

<b>Main Delivery Method(s)</b>	CBT
<b>Contacts and Resources</b>	Enterprise KM: Steve McMillan, Ryan Egan; Jewel Jones; Debbe Lapeirre; Nicole Celardo; Brandon Dennis Business SMEs: Wanda Conte (nGenera), Lindsay Blaser and Nicole Acevedo (Salesforce)

## Content Outline

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Time	Topic and Learning Objective(s)	Content	Methods/Notes
	Learning Outcomes	<p>By the end of this session, participants will be able to</p> <ul style="list-style-type: none"> <li>▪ Recall KCS concepts, components, and roles</li> <li>▪ Summarize the KCS 1 Candidate role</li> <li>▪ Identify the practices in the Double Loop process</li> <li>▪ Recognize article quality components</li> <li>▪ Determine when to flag or suggest changes to an existing article</li> <li>▪ Recognize when to create a new knowledge article</li> </ul>	
Review KCS concepts, roles and responsibilities		<p>Apollo Education Group is promoting a knowledge sharing culture by adopting the Knowledge-Centered Support (KCS) methodology; a set of practices and processes for creating and maintaining knowledge as a key asset of the organization.</p> <p>The Consortium for Service Innovation created and maintains the KCS methodology. For more information about the Consortium or KCS, visit the CSI site provided in the course Resources.</p> <p>Remember that KCS is not something we do in addition to work, KCS becomes the way we work.</p> <p>The primary purpose of this course is to prepare you to perform the role of KCS I Candidate. We will review some of what you learned in the KCS Basics Overview course and expand on the Solve Loop practices and techniques important to your KCS role..</p> <p>KCS Basics Review</p> <ul style="list-style-type: none"> <li>• Four Basic Concepts</li> <li>• Three main components</li> <li>• Remember U.F.F.A.?</li> <li>• Licensed to drive knowledge</li> </ul>	

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Review

**Four Basic Concepts**

The KCS methodology can be summarized in four basic concepts;

- Create content as a by-product of solving issues;
- Evolve content based on use;
- Develop a knowledge base of our collective experience to date; and
- Reward learning, collaboration, sharing, and improving.

All the KCS roles and practices work together to enable these four concepts.

**Three main components**

- Knowledge article- the content
- Solve Loop - four transactional practices
- Evolve Loop - four organizational practices

The 8 practices of KCS are divided into two reinforcing loops focused on creating and maintaining knowledge articles through regular business practices. There is no chronological order to these practices: the activities can happen at any time and in any order.

**Remember U.F.F.A.?**

- Use it - Every time you have or answer a question, search the knowledge base;
- Flag It - When you notice errors or content gaps in an article provide feedback,
- Fix It - When errors are identified a person with rights can implement the feedback,
- Add It - When a knowledge article does not already exist, a person with rights can add it.

**Licensed to drive knowledge**

KCS uses a competency based licensing model for granting system rights and responsibilities. Each role builds on the skills of the previous role. For example, a KCS Reader uses the knowledge base by searching for articles and flagging items that need updates. The next role, KCS Candidate, also performs those duties and has the ability to add to the knowledge base by creating new articles. The KCS Contributor can also validate and style knowledge articles while the KCS Publisher can publish vetted knowledge to self-service.

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Explain the components of the Double Loop process

[Content will be pulled from Foundations CBT once approved]

Solve Loop:

What practices/techniques need to be emphasized or expanded upon for KCS 1? Solve Loop focused: Practices and Techniques

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Explain KCS 1  
Candidate role

KCS is not something we do in addition to work, KCS becomes the way we work. The primary purpose of this course is to prepare you to perform the role of a KCS I. Let's look at the responsibilities and competencies that are expected of the KCS I Candidate role.

KCS I: Candidate responsibilities:

- Utilize the knowledge base
- Rate articles and submit suggestions for article updates (keywords, missing or inaccurate content, etc.)
- Promote a knowledge sharing culture
- Create articles when needed
- Follow best practices

Candidate Competencies

- Effectively able to search the knowledge base for solutions
- Effectively able to flag articles for updates
- Consistently able to capture the customers context in the workflow
- Strong documentation skills (thorough, concise, accurate)
- Strong decision-making skills
- Being able to perform tasks in various systems.

Add: KCS II roles and responsibilities and competencies. This will help the KCS I understand what it will take to move up in roles.

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Explain KCS 2  
Contributor role

It will take some time and practice to become competent in the KCS I Candidate role, The next step on the journey would be the KCS II Contributor role. Review the responsibilities and competencies to identify areas you will need to develop.

KCS II: Contributor responsibilities:

- All responsibilities of the Candidate.
- Search the KB to confirm content of new drafts does not already exist. If content does exist in the KB, Contributor will flag the article for deletion.
- Reviews and/or finishes articles created by Candidates and formats the articles to the specifications of the Content Standard.
- Verifies content in draft articles to be correct, in scope, and relevant.
- Process article suggestions to update content and create new articles.

Contributor Competencies

- All Candidate competencies.
- Understanding of the content standards and knowledge management processes.
- Able to work independently.
- Able to distinguish between well-structured, quality solutions and those that are not.
- Understanding article visibility (audience).
- Issues of redundancy.
- Consistently creates articles that do not require rework and may be in “ready” or “approved states”.

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Role Process Flow

As a Reader, you were able to search and use knowledge articles and flag articles for review. As a Candidate, you get the added benefit of being able to create knowledge articles!

First, a customer calls in with a question. The employee searches the knowledgebase. If knowledge is found, it is provided to the customer. In the event that knowledge isn't found in the knowledgebase, the customer's question is captured. The employee also finds an answer to that question and puts it into a knowledge article. This is then placed into the knowledgebase for everyone to access.

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## Double Loop Practices



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## Solve Loop Practices

As a KCS I Candidate, your primary focus is on the practices in the Solve Loop. These four KCS practices and the techniques described contribute to the creation and maintenance of knowledge:

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## Capture

Capture - capture in the workflow: while solving the problem, we capture the customer's context (their words and phrases) as well as our own knowledge. If it is worth solving, then it's worth saving!

[Do we need to provide a link to the tool specific instructions or tell them how to find it????]

### Techniques:

1. Capture Knowledge in the Moment it Becomes Explicit
    - a. Tacit knowledge is know-how, intuitive knowledge rooted in context, experience, and practice. It is a creative process that is hard to communicate because it resides in the mind of the individual and is shared through socialization, mentoring, and interaction. Knowledge moves from tacit (know-how) to explicit (know-what) when it is documented.
    - b. We capture knowledge through the process of doing the job and problem-solving (just-in-time) instead of waiting for subject matter experts to engineer knowledge.
    - c. The integration of the knowledge base into the problem-solving process (search early, search often) improves effectiveness and greatly reduces the likelihood that we are reinventing the wheel when someone else has already captured the best solution.
  2. Capture the Customer's Context
    - a. Seek to fully understand the situation before solving.
    - b. Frame the employee's situation.
    - c. Improves an article's find-ability.
    - d. Context is as important as content - To make knowledge relevant and findable, it is captured and structured during the problem solving process and in the context of the target audience which could be internal or external.
  3. Capture Relevant Content
    - a. Words and phrases the customer used
    - b. Environment (system, student program)
    - c. Differentiating information
    - d. Solution information

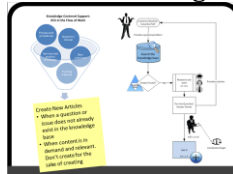
NOTE: Draft Articles – Accurate and relevant
  4. Search Words are Candidate Knowledge
    - a. Searching is a form of capture because we can see trends and other valuable information from what people search for.
    - b. When you search and don't find an article, then you have identified a need for an article to be created.
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Key Candidate Responsibility: As a KCS I Candidate, you have the rights to create new knowledge articles!

Create New Articles

- When a question or issue does not already exist in the knowledge base
- When content is in demand and relevant. Don't create for the sake of creating



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Create a new knowledge article

You search the knowledge base to find out how to perform a process and don't find any articles. You do some research and find out from your manager that a standard operating procedure (SOP) is stored on the team SharePoint site.

What should you do?

1. Thank your manager and move on to your next task
2. Create a new article copying the information from the SOP
3. **Create a new article linking to the SOP**

A new system is rolling out and as a beta tester you received a PDF of the training manual. You search and don't find any articles.

What should you do?

1. Create a series of articles based on what you think frequently asked questions will be
2. **Wait until a question comes up before creating an article**

A student calls in and asks how to change degree programs. You search the knowledge base and don't find an answer. After doing some more research and talking to a coworker you get the appropriate information and advise the student.

What should you do?

1. Create an article
2. Don't create an article as this is a potential mis-advisement risk
3. **Create an article and route it to Compliance for approval**

You are excited about being able to add new knowledge to the knowledge base now that you are a KCS I Candidate. You have half a dozen article ideas and want to get started.

What should you do?

1. **Search the knowledge base before drafting an article**
2. Draft your articles and then search the knowledge base for related articles

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Structure

Structure - structure for reuse: consistent structure, simple templates, and a crisp style improve KCS article readability. We can identify existing KCS articles and their relevant elements quickly to solve the problem.

Techniques:

1. Utilize Simple Templates
    - a. Keep it simple. A little bit of formatting and structure helps improve readability, usability, and promotes consistency.
  2. Complete Thoughts Not Complete Sentences
    - a. Just the relevant facts. Short and succinct, complete thoughts increases readability.
    - b. **Too much:** The student called to report she is unable to log into eCampus from her phone while traveling.
    - c. **Just enough:** Student unable to log into eCampus from mobile phone.
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## Reuse

Reuse - Searching the knowledge base is part of the problem solving process. "Search early, search often" ensures that we are not re-working a problem that already has an answer and that we benefit from the collective experience of the organization.



### Techniques:

1. Search Early, Search Often
    - a. Each search and article selection increases the intelligence of the knowledge base.
    - b. Searching frequently ensures that you are following correct processes and advising properly.
    - c. Searching before creating prevents creation of duplicates.
    - d. Search using the customer's context.
  2. Seek to Understand What We Collectively Know
    - a. Reusing existing KCS articles improves our speed, accuracy and consistency.
    - b. We shouldn't waste resources solving the same problem over and over again. Solve it once, reuse and evolve!
  3. Linking
    - a. When appropriate, link articles to related articles to help others find additional relevant information.
    - b. You should also link to other content resources (policies, websites, manuals) rather than copying the information into the article.
    - c. Some departments will link articles to cases or customer accounts.
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Utilize the  
knowledge base

You find an article that answers your question but is in Not Confirmed status.  
What should you do?

1. **Proceed with caution and review the solution for accuracy**
2. Don't use the article because it has not been validated

Searching the knowledge base every time we have or are asked a question can seem like a challenge, especially for employees in roles that don't typically track every customer interaction in a system. An employee in a project-based role asks for your advice on how to apply KCS.

What should you advise?

1. **Practice searching the knowledge base as the first step in your personal problem-solving process until it becomes a habit**
2. Search the knowledge base only for things that you are unsure of, searching every time is only for call center roles

The biggest factor in creating and maintaining knowledge as an organizational asset is:

1. Integrated technology
2. Well defined processes
3. **Engaged people**

A coworker asks you a question about how to do something that you know resides in the knowledge base.

What should you do?

1. Give the coworker the answer and remind them they should be searching the knowledge base
  2. **Tell the peer that you saw that solution in the knowledge base and advise keywords to help him quickly locate the article**
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## Improve

Improve - reuse is review: as employees, we take responsibility for the articles we interact with. If we see something that is wrong or that we do not understand, we have the responsibility to "flag it or fix it." If this sense of ownership is developed, reuse becomes review. We constantly review and improve the KCS articles that are being used.

Techniques:

### 1. Reuse is Review

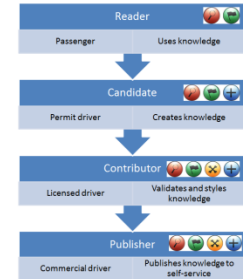
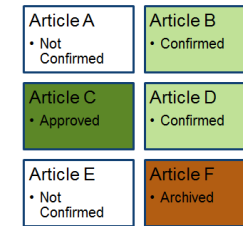
- a. Searching on every issue/question, even when you believe you know the answer is a form of review. When we reuse information we are indicating that it is correct, that we validated the content and we are building confidence in the information for the next person.
- b. Since articles are reviewed and updated only when they are used we only spend time on additional styling and confirmation for those articles that are being searched for and validated.

### 2. Flag It or Fix It

- a. Knowledge is not static, it is messy as it evolves, changes, leaves, morphs, and returns. It is the responsibility of all to consistently update and help with the evolution of knowledge.
- b. Flag It— KCS I Candidates are not licensed to modify other people's articles, so you should add comments to the article so that an authorized person can fix it.
- c. Fix It— If you become a KCS II Contributor, then you will be licensed to modify an existing KCS article.
- d. Types of changes
  - i. Inaccurate content
  - ii. Incorrect spelling and grammar
  - iii. Keywords
  - iv. Duplicate removal request

### 3. License to Modify

- a. The knowledge is collectively owned by the people who use it and as an individual demonstrates their understanding of the standards of knowledge articles they are entrusted (licensed) with more privileges allowing them to create, modify, edit and publish knowledge.
- b. Since the knowledge is collectively owned and constantly changes, modification of knowledge is routine and not an activity that requires prior approval.





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Suggesting changes to articles

You perform a search to find out how to perform a process and find two articles. One is specific to enrollment staff and one is specific to finance. Although the content is similar, it is clear that the process steps vary by audience.

What should you do?

1. Flag as a duplicate
2. **Use the article targeted to your role**

An internal process has changed and the article you find shows the old steps. What should you do?

1. **Flag for review and include specifics in the feedback including a link or source for the new process information**
2. Fix the article yourself
3. Use it, assuming that someone with rights will find the article and fix it

You have a question about submitting an expense report. You search the knowledge base and find an article and use it to resolve your issue. As you are working through the steps, you realize that it would be helpful for the next person to see the related company policy which you found in the Apollo Policy Library.

What should you do?

1. Create a new related article and copy/paste the policy information
2. **Flag the article for review and add feedback with a link to the policy**
3. Move on to the next task on your to-do list, you found the policy so others can too.

You search for information about a specific education program. You find two articles with identical solutions but different titles.

What should you do?

1. **Flag one of the articles as a duplicate**
2. Use either article to answer your question

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Evolve Loop Practices

The four KCS practices in the Evolve Loop are a continuous improvement process that integrates the individual level responsibility for solving problems with Organizational level processes:

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Content Health

Content Health details the techniques that address article structure and life cycle. These techniques help guide in creating a style guide, what information is required, the criteria for evaluating an article, and how to assess the value of an article. Additionally this practice addresses the analysis of new verse known issues and the development of Self-service solutions.

[Do we need to provide a link to the style guide or tell them how to find it????]

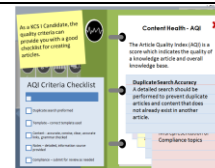
Note: As a KCS I Candidate, we want you creating articles and not spending too much time or effort with styling the article. Capture the information with guidance from the Style Guide.

Style Guide

- Consistent structure to articles
  - Increase readability of articles
  - Ensure professionalism when exposed to students
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Content Health - AQI

The Article Quality Index (AQI) is a score which indicates the quality of a knowledge article and overall knowledge base.



Quality Criteria

- Duplicate Search Accuracy
  - A detailed search should be performed to prevent duplicate articles and content that does not already exist in another article
- Template (If applicable)
  - Most departments will use a Question and Answer template. If you work in a department with multiple article types, selecting the correct template type provides proper structure required for its article content.
- Content
  - The content must be accurate, concise, and clearly understood
  - All links must be accurate and working properly
  - Generally free of grammatical and spelling errors
- Notes
  - The internal notes must be detailed and completed with the source of where the information was obtained
- Compliance Approval
  - Any articles that contain Misrepresentation or Compliance topics

Process & Integration

Process Integration addresses not only the adoption of tools and methods to make the Solve Loop seamless, but also addresses the process of Problem Solving itself (knowledge generation in the workflow – employee asks manager question, gathers info, creates article, directs employee to article)

Performance Assessment

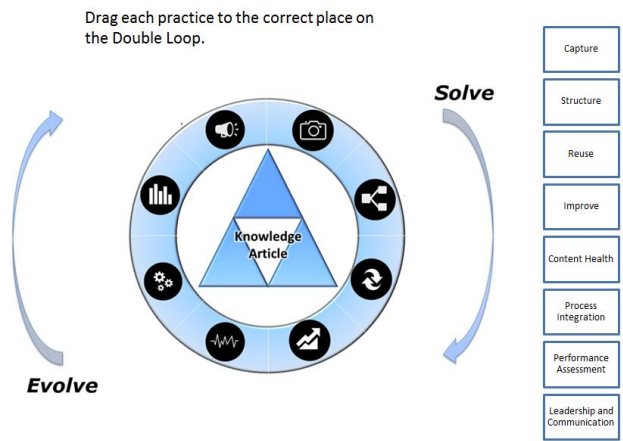
Performance Assessment techniques cover the various roles and measurements of the individual as well as departments and define how value is created and measured.

Leadership and Communication

Leadership and Communication become imperative to the success of any initiative and this is addressed in this KCS practice. The KCS methodology addresses the importance of creating a compelling vision that is in alignment with department and company goals.

REVIEW

Drag each practice to the correct place on the Double Loop.



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Practices  
Knowledge Check

Explore your understanding of the KCS practices by answering the following questions:

Which practice focuses on creating content in the flow of our work while we solve problems? [Capture]

Which practice helps article readability and styling? [Structure]

Which practice ensures that we are not re-working a problem that already has an answer and that we benefit from the collective experience of the organization? [Reuse]

Which practice teaches us that we have a responsibility to “flag it or fix it” when we find issues with a knowledge article? [Improve]

Which practice monitors article life cycle and provides criteria for evaluating an articles value? [Content Health]

Which practice addresses the adoption of tools and methods to make the Solve Loop seamless, and also addresses the process of Problem Solving itself? [Process Integration]

Which practice defines how value is created and measured? [Performance Assessment]

Which practice is imperative to the success of any initiative and addresses the importance of creating a compelling vision that is in alignment with department and company goals? [Leadership and Communication]

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Article Life Cycle	<p>Review the lifecycle of an article and match the roles and statuses</p> <p>A <u>Candidate (KCS I)</u> created a new article after searching the knowledge base.</p> <p>The article was created in a <u>Not Confirmed</u> status and was searched for and used enough to trigger it to be reviewed by a <u>Contributor (KCS II)</u> who then styled, validated and approved the article placing it in a <u>Confirmed</u> status; meaning the content is verified and trusted by employees.</p> <p>If the article continues to be used it triggers a licensed employee to consider sending the article to compliance for approval and publishing the knowledge to an external portal where a customer could find the answer on their own.</p> <p>A <u>Publisher (KCS III)</u> published the article for self-service consumption and placed it in <u>Approved</u> status.</p> <p>A <u>Coach</u> reviews articles and follows up with the different roles to provide feedback and support.</p> <p>A <u>Knowledge Domain Expert (KDE)</u> analyzes the use of the article and archives when needed.</p>	<p><u>Candidate (KCS I)</u></p> <p><u>Contributor (KCS II)</u></p> <p><u>Publisher (KCS III)</u></p> <p><u>Coach</u></p> <p><u>Knowledge Domain Expert (KDE)</u></p> <p><u>Not Confirmed</u></p> <p><u>Confirmed</u></p> <p><u>Approved</u></p>
Next Steps	<p>Practice what you have learned. KCS works because everyone does their part. If every one helps a little, then it helps everyone a lot!</p> <p>The key responsibility that you have as a new KCS I Candidate is to create knowledge while you work. The next time, and every time, that you have a question, search the knowledge base. If you find gaps in content, then add it!</p> <p>Think of the last question that you had or was asked that you had to research and solve. That is candidate knowledge.</p>	

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## Resources

- Procedures for creating articles
  - [insert link to job aid]
- Procedures for rating and flagging articles
  - [insert link to job aid]
- For an overview of the Salesforce (SRM) Knowledge Base, take the Overview CBT:
  - [insert link to LMS activity]
- To learn more about the KCS Methodology, visit the Consortium for Service Innovation:
  - <http://www.serviceinnovation.org/kcs/>

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# Supporting Materials

Type	Topic	Content/Notes	Audience
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