

# Knowledge-Centered Support (KCS<sup>SM</sup>) Basics



By the end of this session, participants will be able to

- describe knowledge and the purpose of a knowledge base;
- define Knowledge-Centered Support (KCS<sup>SM</sup>);
- explain the organizational value of KCS and the benefits of sharing knowledge;
- identify the four basic concepts of KCS;
- identify KCS roles and responsibilities; and
- identify the key components of the Solve and Evolve Loop process.

# Table of Contents

**Directions:** Click on any link below to navigate to that lesson. Click the **Prev** button to return to the last page visited. Click the **Home** button to return to this page at any time.

## Lesson Completed

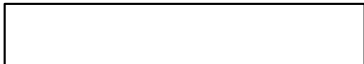
1. Introduction to Knowledge-Centered Support
2. KCS Components and Concepts
3. KCS Practices
4. Roles and Responsibilities
5. KCS in Action

## Additional Notes and Questions

*Will not appear in final product.*



# 1. Introduction to Knowledge-Centered Support



Start Learning Button

# Knowledge-Centered Support (KCS<sup>SM</sup>)

Apollo Education Group is promoting a knowledge-sharing culture by adopting the Knowledge-Centered Support (KCS<sup>SM</sup>) methodology, a set of practices and processes for creating and maintaining knowledge as a key asset of the organization. The Consortium for Service Innovation created and maintains the KCS methodology.\*

## **Consortium for Service Innovation**

- Non-profit alliance of customer service organizations working together to solve industry-wide challenges
- Consortium created in 1992 and maintains Knowledge-Centered Support (KCS) methodology
- Goal was to design and share best practices for capturing, structuring, and reusing knowledge
- We became a member in January 2012

\*KCS is a service mark of the Consortium for Service Innovation.



*CONSORTIUM FOR  
SERVICE INNOVATION™*

## **Additional Notes & Questions**

Place the “\*KCS is a service mark of the Consortium for Service Innovation.” sentence toward the bottom of the page/screen.

# We are All Knowledge Workers



Employee A



Employee B



Employee C

Adopting the KCS methodology is beneficial for all types of workers in virtually any industry. We all need access to different types of knowledge to support our customers both internal to the company and external.

The real challenge is adapting KCS practices into our individual workflow. KCS is not something we do in addition to work, KCS becomes integrated into the way we work.

Before we get into specifics about the practices and roles in KCS, let's take some time to think about what knowledge is and how we use it.

# What is Knowledge?

What is knowledge?

Defining knowledge itself is a challenge because knowledge is intangible, and is measurable by the value it creates for the recipient.

Narrate:

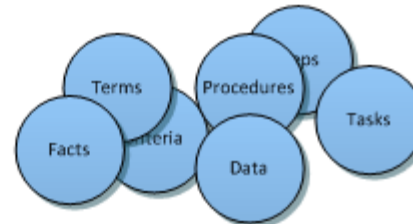
Knowledge is not just content, information made up of data, facts, procedures, concepts, and ideas.

Once content is organized for a specific purpose and context, we can then act upon this structured information.

Knowledge is information upon which people can act.

Knowledge Enables Action

Data =  
Facts and  
content



Information =  
Data organized  
for a purpose



Knowledge =  
Information  
upon which  
people can act

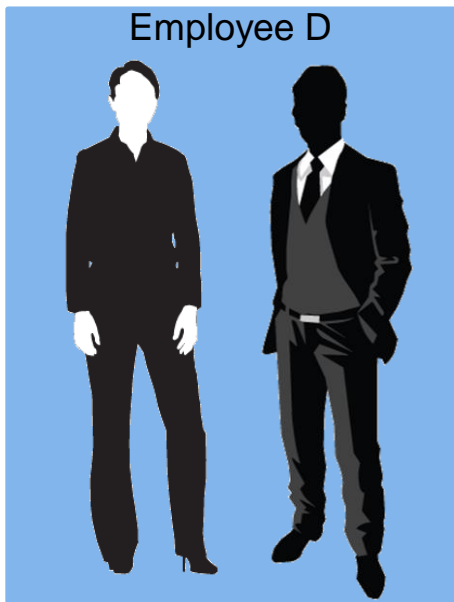


**Additional  
Notes &  
Questions**

# Characteristics of Knowledge



Employee D



T- People's expectation of a knowledge base or a knowledge management methodology is perfect, pristine knowledge approved by experts. We have to change people's expectations of what managing knowledge is if we really want to capitalize on the collective experience of the organization.

T- We all have knowledge that we bring into any situation, gained through our life and work experiences. Think about something that others come to you to get advice about or assistance with, something that you are very knowledgeable about.

NH- Hmm. I am really good at creating tables and reports in Excel and am always asked to help my coworkers with formulas.

T- How did you get that knowledge?

NH- Well I took a course for the basics, but am mostly self-taught through research and trial and error on projects. I also learned a lot from coworkers in the beginning.

T- When did you stop learning?

NH- Never. I learn on every project, even if it is only a more efficient way to do something. Plus, the application has improved over time, so with every version of Microsoft® Office I have something new to learn.

T- How confident are you in your knowledge? Are you 100% confident in what you know?

NH- Well, my confidence depends on the situation and how often I have done something. Plus things never stop changing and I learn new things. Even if I am really sure that I know something, I still wouldn't say 100% confident.

T- How did you gain confidence in what you know?

NH- Through experience and working with others.

T- Exactly right. We are constantly gaining new perspectives and enhancing what we know. And we gain confidence in what we know by trying it, the same way we gain it initially, through experience.

Knowledge is:

- Gained through interaction and experience
- Constantly changing (we never stop learning)
- Never 100% complete or 100% accurate
- Validated through use, experience, and interaction (not by subject matter experts)

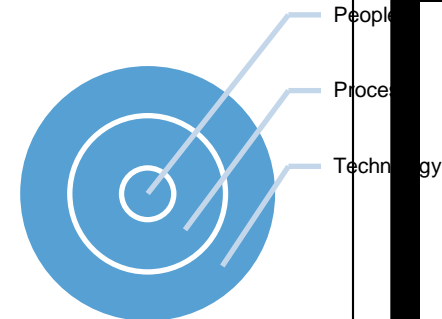
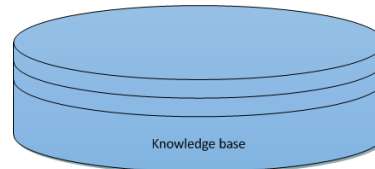
## Additional Notes & Questions

Conversation between trainer (T) and a new hire (NH)

# Value of a Knowledge Management Strategy

## Value of a Knowledge Management Strategy

If you have used a knowledge base before, then you may be asking yourself how KCS is different. The difference is that a knowledge base is technology and KCS is a holistic methodology that incorporates people, processes, and technology. The technology piece is important to get right, but people and processes are what make or break KCS.



Managing the knowledge base takes place in real time by the people who use the knowledge. Each of us is responsible for generating and maintaining the knowledge in an ongoing process represented by the acronym 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.



Use it



Flag it



Fix it



Add it

## Additional Notes & Questions



# Without KCS

In the absence of KCS or another knowledge management strategy, employees will do their best to get the knowledge they need to serve their customers.

Explore typical sources of knowledge before KCS:

Action: Ask your manager

- Walk over to your manager's desk
- Send an email

Result:

- Unavailable – talking on the phone, with a peer, in a meeting
- Distance from procedures, doesn't do the job every day

Action: Ask a coworker

- Talk over the cube
- Send an email
- Find someone available on IM

Result:

- Ask two people - get conflicting answers
- Out-of-date information

Action: Search the intranet

- Search SharePoint
- Review role or team sites (advisor dashboard, team q/a)
- Review training materials
- Presentations created for meetings

Result:

- Too much information to sift through quickly
- Questionable accuracy; who created? When was it valid?

## Additional Notes & Questions

Use desk background on following slide to work through the different scenarios

# Without KCS

Action: Search personal files

- Search for emails
- Saved files and presentations
- Post-it notes
- Printed job aids, training materials, and meeting notes

Result:

- Information hard to find, unstructured, out of date

Action: Memory/I know this!

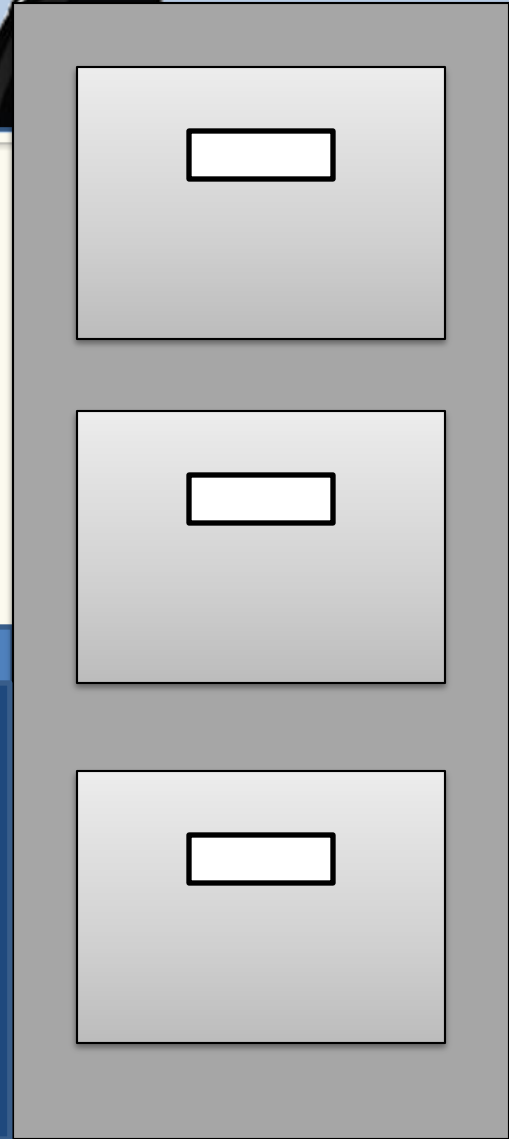
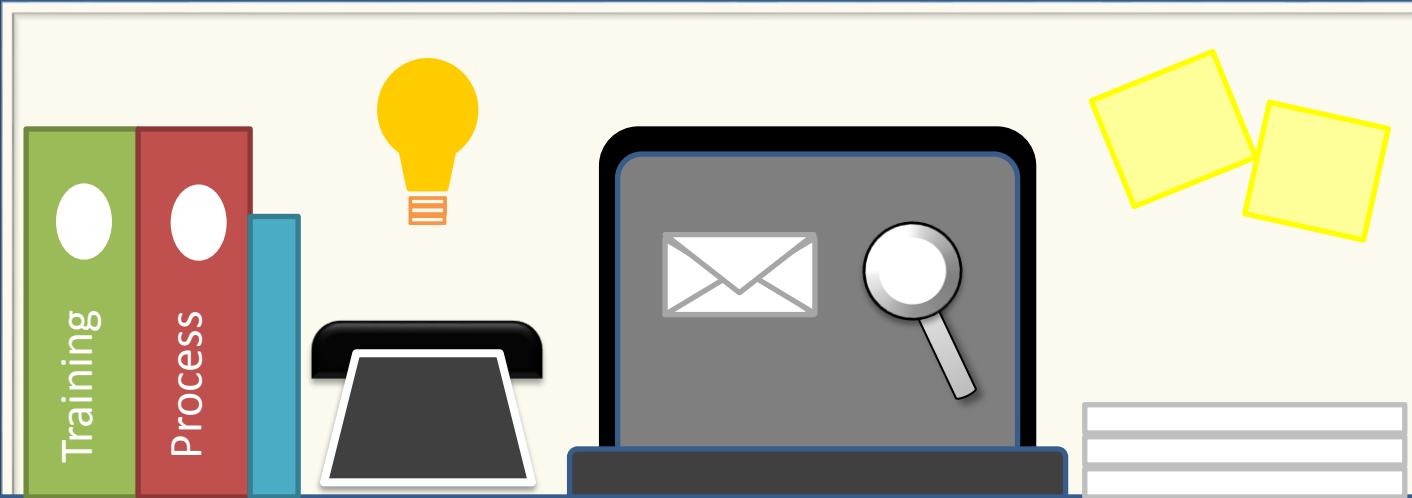
- Recall previous experience

Result:

- Memory is fallible
- Information, processes, and policies change
- No one else benefits

## Additional Notes & Questions

Use desk background on following slide to work through the different scenarios



## Action Taken

Ask your manager

- Walk over to your manager's desk
- Send an email

Result:

- Unavailable – talking on the phone, with a peer, in a meeting
- Distance from procedures, doesn't do the job every day

## Consequence

Call back customer  
Waste time



Training

Process

# Consequences

Consequences of not consistently creating and sharing knowledge

Customer

- Inconsistent answers
- Delays and callbacks
- Can't help themselves; vetted knowledge could be used for self-service

Employee

- Time wasted looking for answers
- Lack of "real-time, fingertip knowledge" causes the need for specialization
- Multiple ways to do everything, but the best way should be the way
- Lack of easy knowledge is painful and demoralizing to staff

Organization

- Change happens – roles, areas of expertise, teams, processes, policies, terminology
- Lack of easy knowledge increases time to efficiency for new hires
- Loss of historical information and expertise with attrition
- Mis-advisement - wrong answers that affect the student, lower confidence, cause write-offs and lawsuits
- Lack of easy-to-retrieve knowledge causes call-backs, mistakes...all negative student impacts

**Additional  
Notes &  
Questions**

# Benefits

Benefits of consistently creating and sharing knowledge:

## Customers

- Increased confidence
- Improved experience (speed, accuracy, consistency)

## Employees

- Feel personal empowerment and recognition
- Receive peer feedback
- Broader expertise and job satisfaction

## Organization

- Improved effectiveness and efficiency
- Evolving resources and expertise (capacity)
- Improved relevance and loyalty

**Additional  
Notes &  
Questions**

# Work is Problem Solving

At a basic level, we can think about our work and interactions with others as a series of questions to be answered.

We naturally go through a problem-solving process multiple times a day, usually without much thought about the mechanics of how we solve problems, answer questions, and generally get things done.

Your process probably looks something like this:

Question is asked

- Student question
- Coworker question
- Personal question
- Process or project question

Go through personal problem-solving process

- Do I know the answer from memory?
- Have I asked or been asked this before?
- Do I need more information?
- Are there other variables?
- Is there a process/policy/system involved?

Question is answered

- Research
- Advise customer (self, student, or coworker)
- Move on to next question/interaction/task

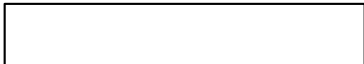
Question is asked... again

- Didn't I already answer this?
- Where is that email?
- There has to be an easier way!

There is a better way! KCS gives us a structured way to solve problems and capture the information in an article for reuse by us and others.

**Additional  
Notes &  
Questions**

# 2. KCS Components and Concepts



Start Learning Button



# Three Components of KCS

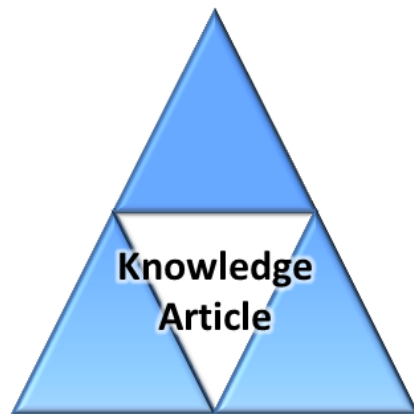
KCS is broken into three main components:

1. Knowledge article – the content
2. Solve Loop – four transactional practices
3. Evolve Loop – four organizational practices

Knowledge is at the heart of KCS.

Knowledge must be

- timely;
- findable; and
- usable by a target audience.



**Additional  
Notes &  
Questions**

# Three Components of KCS

The eight practices of KCS are divided into two loops that reinforce each other and are 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.

## Solve Loop – the transactional practices

The first loop, called the Solve Loop, represents daily activities including capturing, structuring, reusing, and improving a knowledge article. Some examples could be addressing a student's question, creating a knowledge article, making a suggestion, or correcting an article.

## Evolve Loop – the organizational practices

The Evolve Loop represents the processes that occur at the organizational level. These are practices that help set the stage for the quality of the knowledge article. This involves activities such as monitoring content health, integrating knowledge processes, overall performance assessment, and leadership.



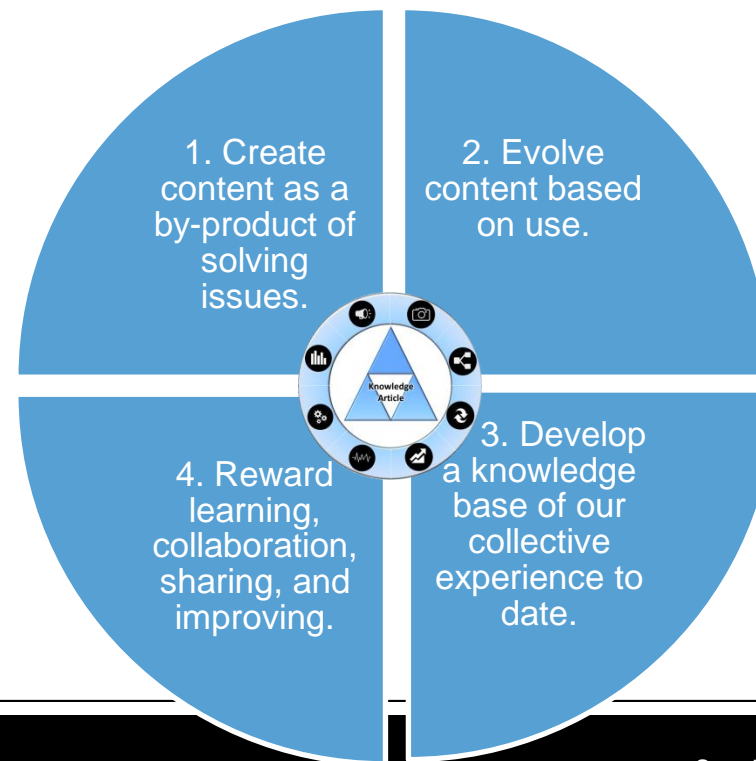
**Additional  
Notes &  
Questions**

# Four Basic Concepts

The KCS methodology can be summarized in four basic concepts:

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

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

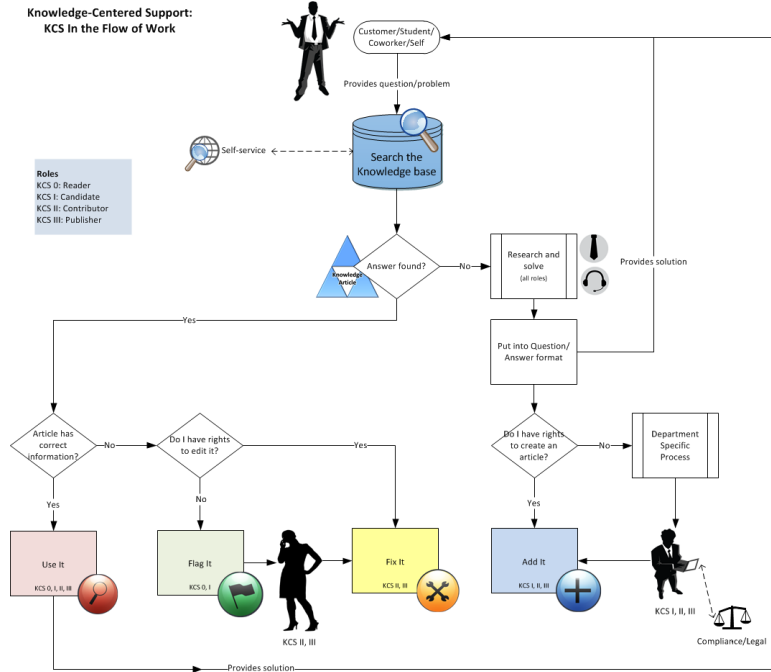


Additional  
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Questions

# Create Content as a By-Product of Solving Issues

KCS becomes integrated into the way we work only through making a conscious effort at first, but it will become second nature over time. We need to get to the point where KCS is not something we do in addition to work, KCS becomes the way we work.

Additional Notes & Questions



# Evolve Content Based on Use

Articles are reviewed and updated only when they are used. That means that we only spend time on additional styling and confirmation for those articles that are being searched for and validated.

An article in Not Confirmed status has not been searched for and used enough to trigger it to be reviewed, validated, and put into a Confirmed status.

Over time, some articles will be put into Approved status and be published for use by external customers, and some articles will be Archived due to lack of use.

Article A • Not Confirmed	Article B • Confirmed
Article C • Approved	Article D • Confirmed
Article E • Not Confirmed	Article F • Archived

Additional  
Notes &  
Questions

# Develop a Knowledge Base of our Collective Experience to Date

KCS breaks through the limitations of traditional knowledge strategies and enables organizations to deliver greater value with more efficiency. The secret? Capitalizing on what we already have—knowledge.

This increased value is created and managed by capturing the collective experience of the organization in solving problems and answering questions for internal and external customers. Making that knowledge reusable, and evolving it to reflect organizational-level knowledge, creates huge leverage.

- Process and Procedures
- Services and Product Knowledge
- Training Material
- Question/Answer
- Lessons Learned
- Best Practices

Knowledge  
Base



Additional  
Notes &  
Questions

# Reward Learning, Collaboration, Sharing, and Improving

For most organizations, the adoption of KCS represents a major shift in thinking. It requires a shift in the organization's culture (values and focus) from:

## Old Value and Focus

- Individual
- Activity
- Completion
- Escalation
- Content
- Knowing

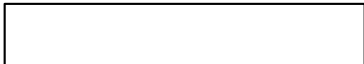
## New Value and Focus

- Team
- Value Creation
- Evolution
- Collaboration
- Context
- Learning and Sharing

KCS is a journey, not a destination.

**Additional  
Notes &  
Questions**

# 3. KCS Practices



Start Learning Button



# Eight Practices

Knowledge is at the center of KCS, content is king.

The eight practices of the Solve and Evolve loop answer fundamental questions that must be addressed when implementing a knowledge management strategy.

**Capture:** How do we capture knowledge?

**Structure:** How do we make the knowledge readable and findable?

**Reuse:** How do we leverage existing knowledge?

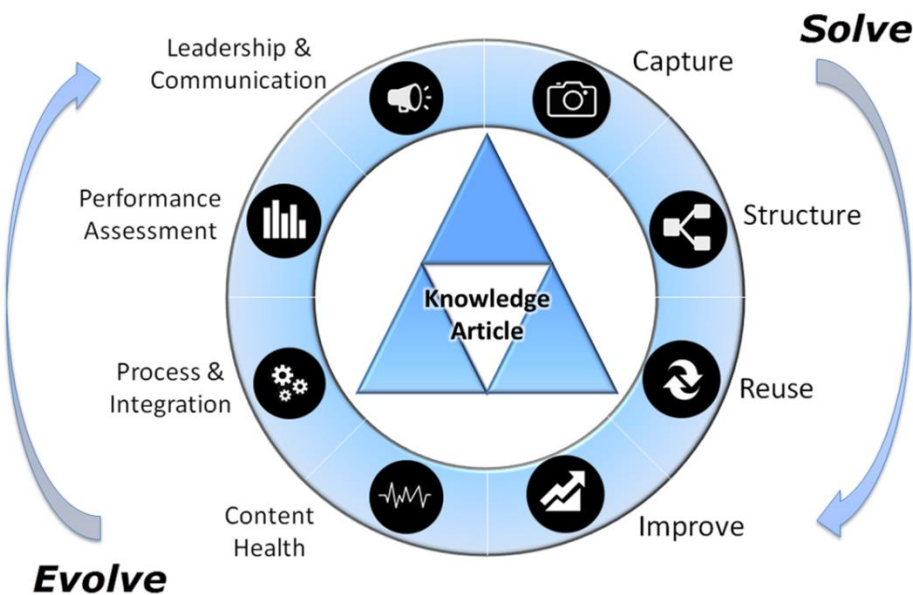
**Improve:** How do we keep content current and accurate?

**Content Health:** What are we trying to create?

**Process and Integration:** How are we going to create good content?

**Performance Assessment:** How do we measure how we are doing?

**Leadership and Communication:** How do we get people to buy-in and change how they do their jobs?



## Additional Notes & Questions

Zoom in on each practice and show the corresponding question in a call out.

# Solve Loop Practices

These four KCS practices contribute to the creation and maintenance of knowledge in the Solve Loop.

**Capture** - Capture in the workflow: While solving the problem, we capture the customer's context (his or her words and phrases), as well as our own knowledge.

**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.

**Reuse** – Search early, search often: 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.

**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.

## Additional Notes & Questions

Customer = target audience, could be you, student, coworker, boss, etc.



Capture



Structure



Reuse



Improve



# 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.

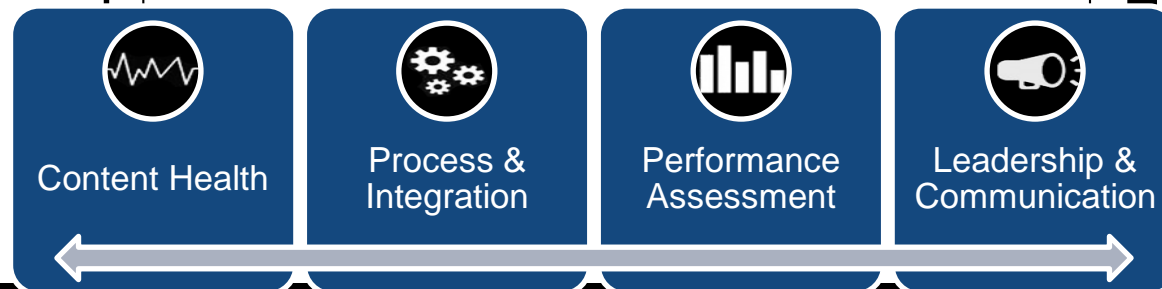
**Content Health** details the techniques that address article structure and life cycle. These techniques help guide in creating a style guide, what information is required, the criteria for evaluating an article, and how to assess the value of an article. Additionally, this practice addresses the analysis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

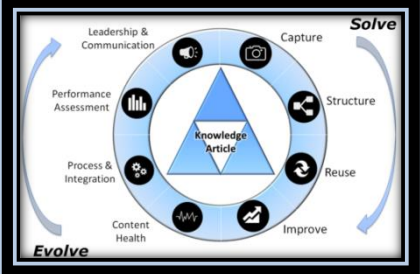
**Process and Integration** addresses not only the adoption of tools and methods to make the Solve Loop seamless, but also addresses the process of problem solving itself (knowledge generation in the workflow: employee asks manager a question, gathers information, creates article, directs employee to article).

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

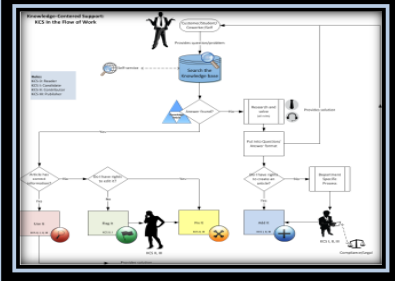
**Leadership and Communication** become imperative to the success of any initiative and this is addressed in this KCS practice. The KCS methodology addresses the importance of creating a compelling vision that is in alignment with department and company goals.

## Additional Notes & Questions





**Roles**  
 KCS 0: Reader – Uses knowledge  
 KCS I: Candidate – Creates knowledge  
 KCS II: Contributor – Validates and styles  
 KCS III: Publisher – Publishes to self-service



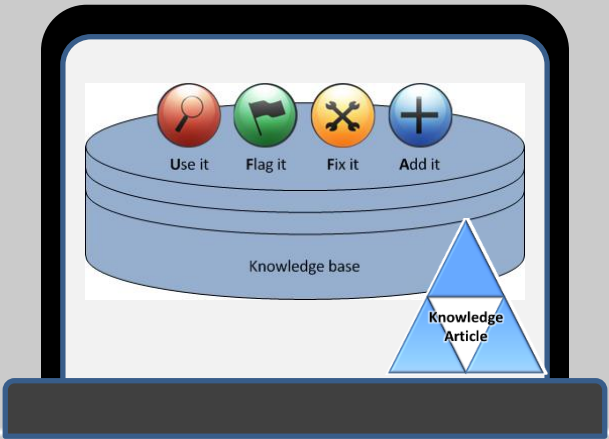
**Evolve**

Content Health

Process & Integration

Performance Assessment

Leadership & Communication



**Solve**

Capture

Structure

Reuse

Improve

**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.	Reward learning, collaboration, sharing, and improving.
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# Capture

## Capture

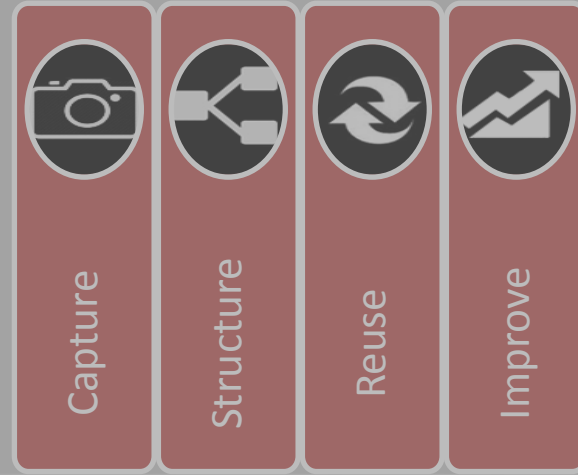


How do we capture knowledge?

Capture - capture in the workflow: while solving the problem, we capture the customer's context (his or her words and phrases), as well as our own knowledge.



## Solve

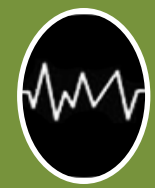


Knowledge collective late; and	Reward learning, collaboration, sharing, and improving.
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## Evolve

- Content Health
- Process & Integration
- Performance Assessment
- Leadership & Communication



# Content Health

## Content Health



What are we trying to create?

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.

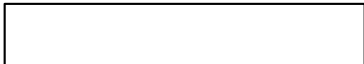
Additionally, this practice addresses the analysis of new verse known issues and the development of self-service solutions.

- Improve

Create content as a by-product of solving issues; Evolve

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# 4. Roles and Responsibilities



# Licensing Model

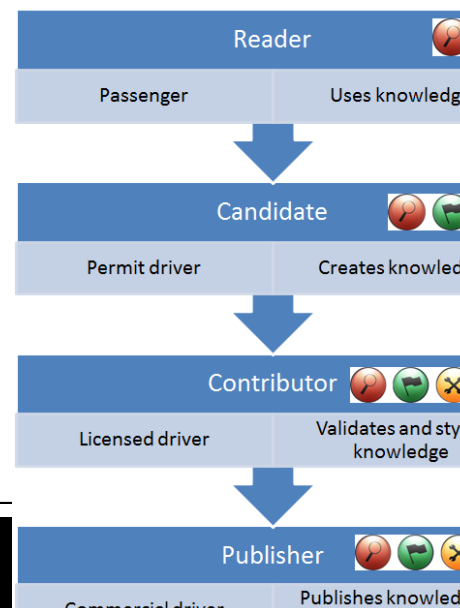
For most employees, learning to capture and structure knowledge represents a significant change in behavior and activities. The KCS knowledge and competency model defines responsibilities, system rights, and privileges for each role: KCS Reader, KCS Candidate, KCS Contributor, and KCS Publisher.

If we use a driving metaphor, adopting KCS is like learning to drive a car. Before getting behind the wheel, we were passengers and got the benefit of riding in the car without the responsibility of driving. When we first started, we got a learner's permit, and we had to have a licensed driver along as a coach. Initially, we had a great deal to think about and driving took all of our attention.

Earning a driver's license gave us new rights and privileges and enabled us to drive on our own. For most of us, this represented a significant increase in our independence with a corresponding increase in our parents' anxiety. Our parents worried about the risk and whether we would make the right decisions. Eventually, with enough experience, driving became second nature to us. As with driving, some people will choose to progress further, study more, and gain more advanced skills.



## Additional Notes & Questions





# Licensing Model

Adopting KCS is like learning to drive. People learn how to do the KCS processes as they are resolving issues. Like learning to drive, we can be told the concepts in a classroom setting, but only with practice can we internalize the behaviors and competencies so they become second nature.

As with driving, each license is earned based on demonstrated consistent behaviors that align with the KCS role. Some departments also require a test to move from one level to the next. As with a license to drive a car, an employee who frequently breaks the rules or demonstrates poor judgment may lose his or her license.

Three additional support roles are identified by KCS: the KCS Coach, Knowledge Domain Expert (KDE), and KCS Council.

KCS Coach	
Driving instructor	Coaches KCS roles
Knowledge Domain Expert (KDE)	
Department of Motor Vehicles	Monitors practices
KCS Council	
Department of Transportation	Global guidance

## Additional Notes & Questions

# Roles Match Solve Loop

Explore the KCS Roles and Responsibilities by answering the following questions:

Which role can use knowledge and flag articles, but does not have the rights to add articles?

Reader (KCS 0)

Which role would you need to be to create a new article?

Candidate (KCS I)

Which role can validate and style articles created by a Candidate?

Contributor (KCS II)

Which role is responsible for preparing self-service articles?

Publisher (KCS III)

Which role can create new articles, but does not have rights to fix articles?

Candidate (KCS I)

## Additional Notes & Questions

For each question, the learner should select the correct "license"

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KCS 0: Reader:

- Use Knowledge
- Rate Articles
- Submit Suggestions
- Request New Articles

Reader

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KCS I: Candidate

- All KCS 0 Responsibilities
- Create New Articles
  - By Request
  - When Not Found
- Submit New Articles for Compliance Review

Candidate (I)

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KCS II: Contributor

- All KCS I Responsibilities
- Validate Articles Submitted by KCS I
- Style Compliance Articles Prior to Compliance Submission

Contributor (II)

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KCS III: Publisher

- All KCS II Responsibilities
- Provide additional validation
- Prepare Articles for Self-Service Consumption
- Manage Feedback

Publisher (III)

# Roles Match Evolve Loop

Which role provides feedback to other KCS roles and is a change agent?

Coach

Which role monitors content health and provides reporting to leadership?

Knowledge Domain Expert (KDE)

Which role provides department-level direction and is actually a group that consists of at least one manager, KDE, and representation from KCS roles within the department?

KCS Council

## Additional Notes & Questions

For each question, the learner should select the correct "license"

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**KCS Coach**

Coach:

- Assist with all KCS roles
- Provide feedback and coaching to KCS Is, IIs, and IIIs
- Perform routine AQIs on team members
- Be a change agent

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**Knowledge Domain Expert**

KDE:

- Assist with all KCS roles
- Monitor Coaches and Provide Feedback
- Monitor Content Health
- Provide Routing Performance Reports to Leadership

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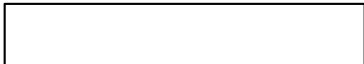



**KCS Council**

KCS Council:

- Routinely Discuss KCS Performance and Adoption
- Provide department level direction

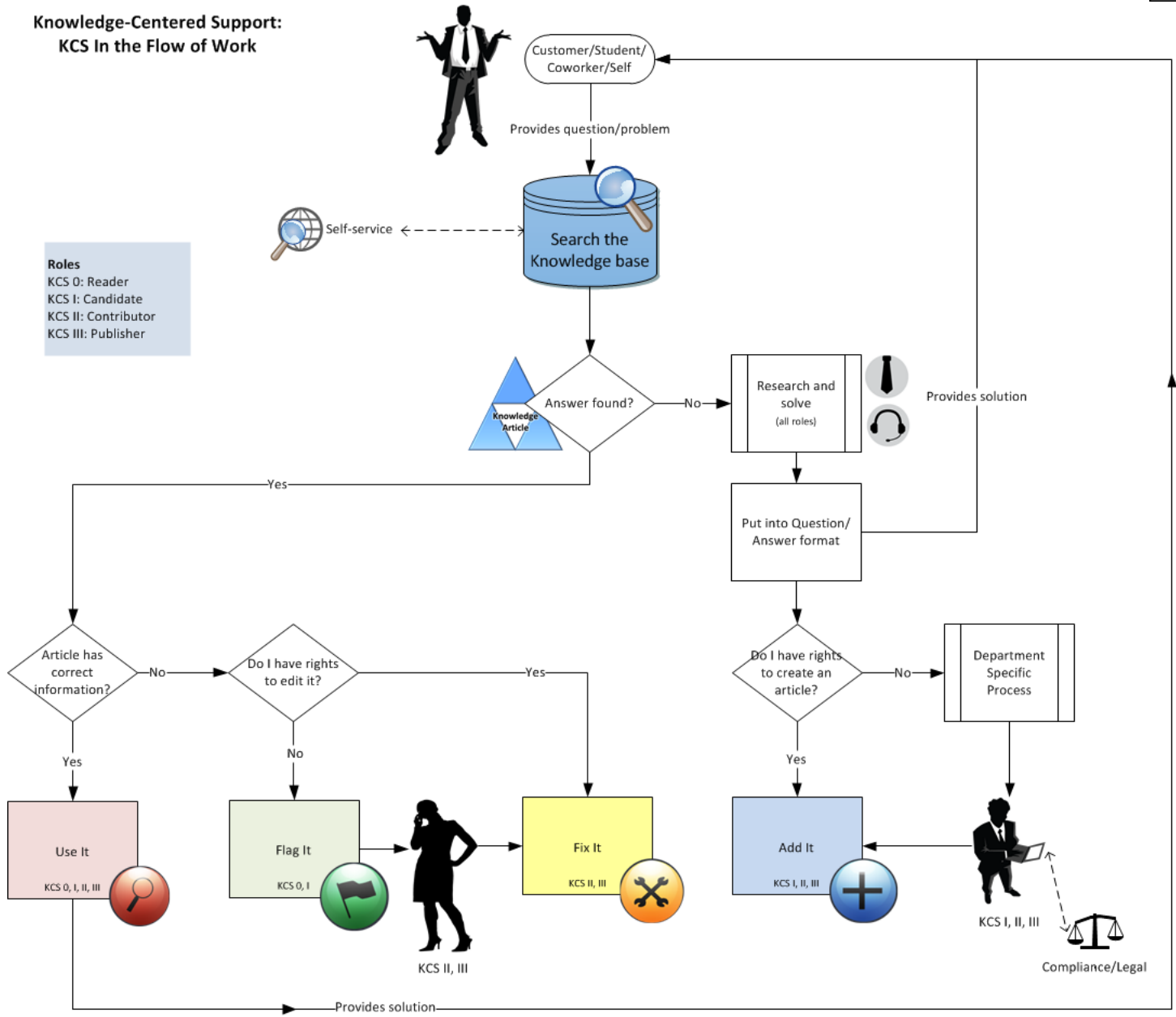
# 5. KCS in Action

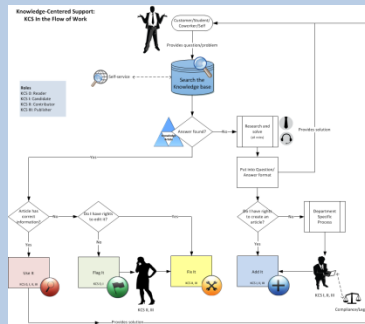


Start Learning Button

**Knowledge-Centered Support:  
KCS In the Flow of Work**

- Roles**  
 KCS 0: Reader  
 KCS I: Candidate  
 KCS II: Contributor  
 KCS III: Publisher





on:

How do I change my information in MyHR?

:

How do I change or edit information in MyHR:

1. Type MyHR in the address bar.

2. Log into MyHR using your ntlogin and password.

3. Click **Main Menu**.

4. Click **Self Service**.

5. Click **Personal Information**.

6. Select the information you would like to edit.

7. Click **Update** to update your personal information.

Status: Not Confirmed

### Question:

How do I change or edit personal information in MyHR?

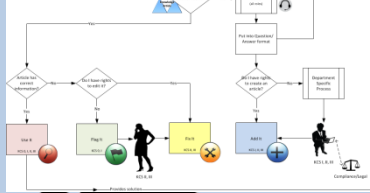
### Answer:

To change or edit information in MyHR, perform the following steps:

1. Open **Mozilla Firefox** web browser.
2. Type **MyHR** in the address bar.
3. Press **Enter**.
4. Log into MYHR using your ntlogin and password.
5. Click **Main Menu**.
6. Click **Self Service**.
7. Click **Personal Information**.
8. Select the information you would like to edit.

You can update the following information:

- Personal Information Summary
- Home and Mailing Address



### Question:

How do I log in to eCampus with my University of Phoenix (UOPX) Mobile App?

### Answer:

To log in with UOPX Mobile App v.2.0, perform the following steps:

1. Open the application.
2. Enter your **username** and **password** at the login screen.
3. Tap **Login**.
4. Set up a **passcode** (optional). If you opt for a passcode, create a four (4)-digit **PIN**.
5. Confirm the **PIN**.

You are prompted for the PIN each time you access the application. If you enter an incorrect PIN three (3) or more times, or tap Forgot your passcode?, the passcode feature is disabled and the login screen reappears. Failure to enter a passcode or tapping Forgot your passcode? disables the passcode feature. Note: You can re-enable the passcode feature from the Settings menu.

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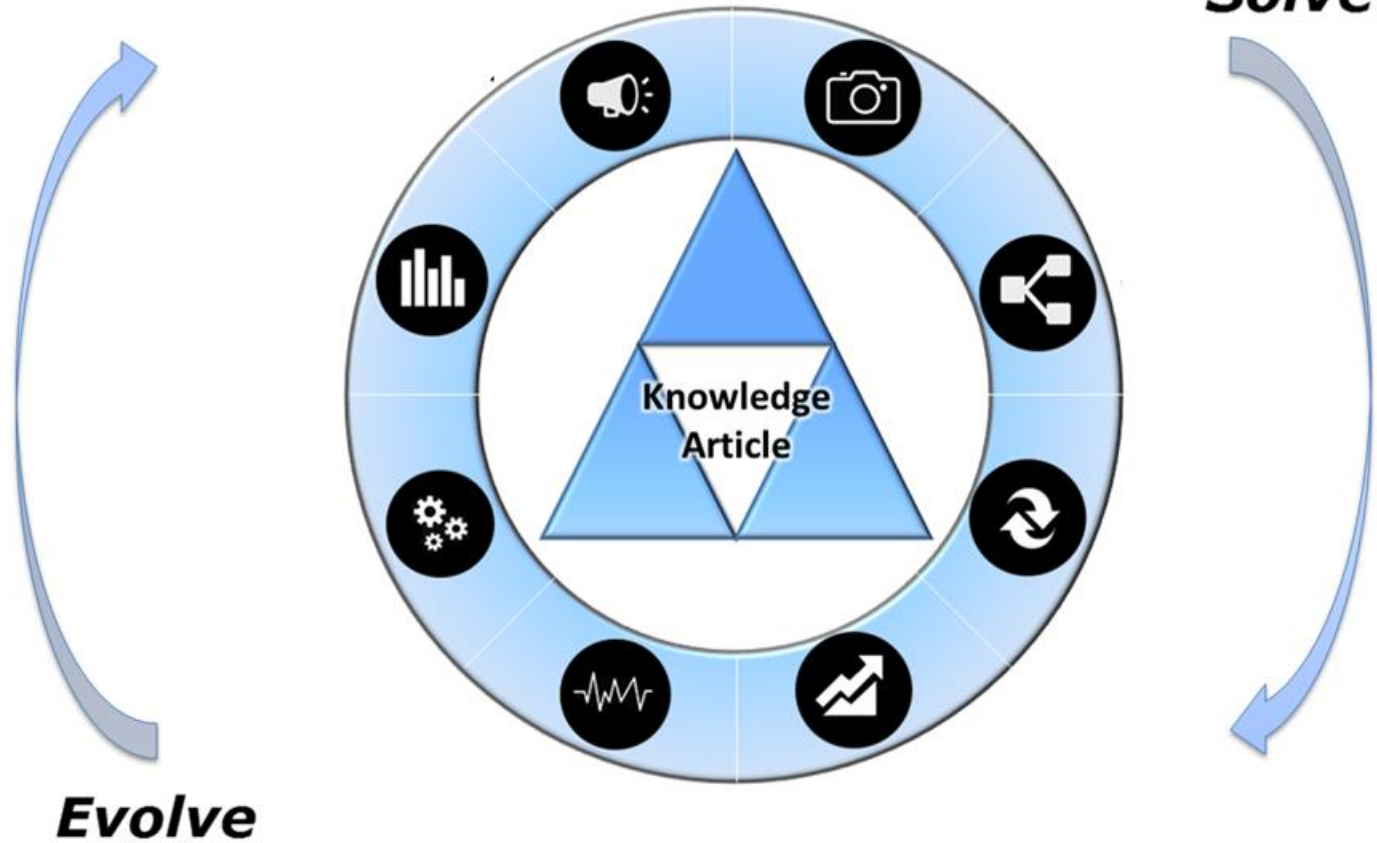
Not

# Review

Start Learning Button



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



Capture

Structure

Reuse

Improve

Content Health

Process and Integration

Performance Assessment

Leadership and Communication

# 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 article’s 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 and 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]

## Additional Notes & Questions



Capture

ASSESSMENT



Structure



Reuse



Improve

To learn more about the KCS Methodology, visit the Consortium for Service Innovation:

<http://www.serviceinnovation.org/kcs/>

- describe knowledge and the purpose of a knowledge base;
- define Knowledge-Centered Support (KCS<sup>SM</sup>);
- explain the organizational value of KCS and the benefits of sharing knowledge;
- identify the four basic concepts of KCS;
- identify KCS roles and responsibilities; and
- identify the key components of the Solve and Evolve Loop process.

## Conclusion & Next Steps

Congratulations, you have completed the tutorial portion of this course. In this course, you have learned

(add the word “to” after learned above, and then list here with bullet points the learning objectives in the column on the left.)

To receive completion credit for this learning experience, you must close this window and successfully complete the accompanying

### To complete the assessment now:

1. Close this tutorial window.
2. Click the **Return to Activity Progress** link on View Progress screen.
3. Click the \_\_\_\_\_ assessment link on the Activity Progress screen.

### To complete this at a later time:

Open **My Learning Self-Service>Learning>All Learning** and launch the assessment from your All Learning Activities screen.

Your feedback on this class and all others ensures continuous improvement of the courses we develop and deliver. Please take a moment to click the course survey link on your Activity Progress page to complete a short survey and provide your feedback.