Technique 7.1: KCS Roles and the Licensing Model

A Licensing Metaphor

We have been describing two major efforts: learning to capture and structure in the workflow, and practicing the structured problem solving process (as described in the Workflow section). For most responders, these represent significant changes in behavior and activities. If we use a driving metaphor, adopting KCS is like learning to drive a car. 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. We had to watch the road, other cars, our speed, and the rear view mirror. Most of us learned rapidly how to deal with all these dynamics and went on to pass a test to get our licenses.

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. Along with this increase in our autonomy came an increase in our responsibility and the need for auto insurance. Eventually, with enough experience, driving became second nature to us, to the point where we now (unwisely) attempt to do other things while we are driving, like eating or talking on the phone.

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

The KCS licensing model defines system rights and privileges for each role: KCS Candidate, KCS Contributor, and KCS Publisher. As with driving, some people will choose to progress farther, study more, and gain more advanced skills. Performance assessment must include guidance on how, when, and whether to advance. As with driving, each license is earned based on demonstrated consistent behaviors that align with the KCS role. For example, a provisional license is issued after the knowledge worker attends a class and demonstrates a basic understanding of the KCS practices and techniques. The KCS Contributor and KCS Publisher competency levels are achieved after consistently demonstrating the respective incremental competencies defined in those roles. Many organizations also require a coach's recommendation to move from one level to the next. As with a license to drive a car, an knowledge worker who frequently breaks the rules or demonstrates poor judgment should lose their license.

Note that the levels of KCS competency are not linked or related to the levels, job roles, or positions in an organization. In a support organization, each level of support (tier 1, tier 2, tier 3) should have a mix of analysts with a range of KCS competencies.

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The KCS Council

Perhaps the most difficult hurdle in adopting the KCS methodology requires changing the culture of the organization to a truly collaborative, knowledge-sharing environment. KCS identifies some critical roles to support the organization in this transition. The roles help redefine the way knowledge is created, valued, and shared. Additional details can be found in the KCS v6 Adoption Guide.

The critical roles for KCS are:

**LEADERS**—managers must become leaders. They must define the vision of what success looks like at their level of the organization, and then support the knowledge workers in deciding how the work should be done (workflow) and defining the standards for findable and usable KCS articles (content standard).

**KNOWLEDGE WORKERS**—Anyone responding to an interaction or request are knowledge workers.

- KCS Candidate
- KCS Contributor
- KCS Publisher

**KCS COACHES**—change agents and KCS Practices experts who support the development of the KCS competencies and the proficiency development of knowledge workers from KCS Candidate to KCS Publisher. Generally, a peer working part time as a Coach—a "player coach."

**KNOWLEDGE DOMAIN EXPERTS**—responsible for identifying Evolve Loop content based on KCS articles created in the Solve Loop workflow, look after the health of the knowledge base, usually focused on a collection or domain of content, has both technical expertise in the domain and profound understanding of KCS processes.

Evolution of the KCS Council

Over time the adoption activities diminish and the KCS Council shifts its focus to continuous improvement through sustaining and improvement activities. As the organization gains experience with KCS, there will be a need to tune the KCS processes based on that experience. This review and enhancement works best through a KCS Council that meets on a bi-weekly basis to discuss issues and improvements. The KCS Council is a cross functional group with global representation, which continues to include the KCS Coaches, the Knowledge Domain Experts, and representatives from management. The KCS Council provides the forum for continuous improvement to the content standard, the workflow, tool functionality and integration, and the feedback and reporting systems. This critical continuous improvement sustains and optimizes KCS benefits.

Distribution of Roles in the Organization

There are two dimensions to consider when thinking about the number and type of roles for an organization:

- The nature of the work being performed, including things like complexity, volume, and rate of redundancy in incoming requests.
• The maturity of the existing KCS processes in the organization.

In a start-up environment, the majority of knowledge workers have Candidate or Contributor licenses, there is a Coach to knowledge worker ratio of 1:5 to 1:8, and there probably is not enough content to warrant a Knowledge Domain Expert.

In a mature environment, the Coach to knowledge worker ratio usually evolves to something like 1:50, and knowledge domains evolve to the point where a Knowledge Domain Expert has sufficient content volume to look at patterns and trends.

Knowledge workers at the KCS levels reside in each level and role in the organization. It is important to distinguish between KCS competency and technical depth—there is not a 1:1 correlation.

For example, each support tier should have members at the KCS Contributor and KCS Publisher levels of competency that can create and validate KCS articles for the problems solved at their level. As the KCS processes mature in the organization, all but new knowledge workers in training should be at least at a KCS Contributor level.

The ultimate goal for high complexity environments is to get the majority of the knowledge workers to a KCS Publisher level. For low complexity environments the goal is to have enough KCS Publishers in the organization such that at any point in time we have zero articles in the queue waiting to get published. Or stated another way, if we have articles that are identified as externally-usable waiting to get published, then we don't have enough Publishers.

Evolution of the KCS Roles

The licensing model is one important part of the quality assurance model for KCS. The organization must monitor the quality of the work being done and be willing to revoke the KCS license if the quality of work slips below an acceptable level (see the Content Standard Checklist section in Content Health for more on this).

The KCS user development diagram below shows the typical evolution path from role to role. Not everyone is appropriate for or interested in taking the step to the next role. Anyone an organization would trust to come up with a new answer for a customer should, in time, become a KCS Contributor. Use the descriptions and characteristics detailed in the next section to help identify the right people to move along the KCS path.
KCS Roles for the Team: Detailed Responsibilities and Qualifications

The following section provides guidance on the type of knowledge, the skills, and, in some cases, the personality traits that are necessary for success with KCS. The Consortium and its partners offer training specifically geared to acquiring the skills for these different roles. Additional details can be found in the KCS v6 Adoption Guide.

The KCS Council is responsible for defining the roles and responsibilities as a part of building the foundation before the pilot. This includes updating job or role descriptions as well as defining the expected competencies for each KCS role within the KCS Competency Model (i.e. KCS Candidate, KCS Contributor, etc.) They may also modify these as a result of analyzing the pilot or during early adoption. Once KCS has been implemented and the KCS Council takes on the responsibility for evolving the maturity of the KCS Practices, they may identify the need to update the competency model and the competencies for specific roles. Normally they would propose the changes for management approval.

KCS Candidate

The KCS Candidate understands the basics of KCS and knows how to interact with the knowledge base in a way that captures their experience and capitalizes on the collective experience of the organization. A KCS Candidate must be able to recognize relevant information in the knowledge base and exercise judgment in their interaction with it. They should not use or deliver a KCS article that they do not understand. Since articles in the knowledge base are created with a specific audience in mind, dictating vocabulary and level of technical content, a Candidate adapts knowledge to suit the profile of the target audience.

Upon completion of training (often web-based training or an element of new hire training), the KCS Candidate should:

- Understand the structured problem solving process
- Accurately and consistently capture the requestor’s context in the workflow
- Search for and find existing KCS articles
- Review and either link or flag articles in the problem solving workflow
- Modify their own KCS articles
- Frame new KCS articles (Work in Progress or Not Validated) which will be reviewed or finished by a KCS Contributor or KCS Coach

KCS Contributor

The KCS Contributor reviews (as they reuse) or finishes KCS articles that are framed by themselves or others, making
ensure the articles adhere to the content standard. The KCS Contributor has the capability and authority to create or validate articles in their product area without review by a Coach. They may also author and approve articles for broad audience visibility. They may directly improve articles that have article audience set to Internal and should flag articles in an External state that need to be updated or improved.

While the KCS Candidate creates articles that are Work in Progress or in a Not Validated state, the KCS Contributor can create content that is in a Validated state. A Validated article implies a high degree of confidence in both the technical accuracy and compliance with the content standard. A KCS Contributor can put articles that are in a Work in Progress or Not Validated state into a Validated state if in his or her judgment the article is "sufficient to solve."

The KCS Contributor competencies are incremental to those of KCS Candidate and involve a detailed understanding of the importance of the context of the audience, the content standard, the Content Standard Checklist, and the KCS processes. They should be able to work independently by creating well-structured KCS articles and be adept at enhancing others' articles to make them visible to a wider audience. The KCS Contributor should also be able to demonstrate understanding by passing an exam.

KCS Publisher

The KCS Publisher is authorized to set the article audience to External or publish content to an external audience, typically on the web, as well as to modify externally-facing content. In KCS environments, "publish" means making the KCS article visible to partners or customers. Compared to a KCS Contributor, the KCS Publisher takes a more global, outward view of the audience and the content. The KCS Publisher knows the technical implications of the knowledge being published, has an understanding of what material is priority information, and has an understanding of copyright and trademark policies enforced by his organization. The KCS Publisher is also responsible for understanding the external audience and publishing requirements outlined in the content standard. Because External KCS articles may be linked from other websites and may be visible to a large audience, the KCS Publisher must exercise good judgment about modifying External articles.

In determining readiness to move to the KCS Publisher level, consider that the KCS Publisher should be consistently adhering to the Content Standard Checklist, following the KCS workflow (measured by the Process Adherence Review), and have consistently positive feedback on and high reuse of article content. They should reliably focus on the success of the team and the customer over individual success.

The KCS Publisher may flag External content for archival or deletion, but because removing externally-facing content from the web is an activity with difficult-to-assess implications, typically the KCS Publisher can't personally archive or delete.

As KCS matures in the organization, a high percentage of the knowledge workers should be at the KCS Publisher level. This percentage allows the just-in-time publishing of content that drives a high level of customer success with web-based self-help. This is especially important in order not to create a backlog of flagged External content, because KCS Contributors may not directly edit External articles. The KCS Publisher should also be able to demonstrate proficiency by passing an exam.
The KCS License

The KCS Contributor and KCS Publisher roles need to have a well-defined path to achieve those levels. The knowledge worker should have to demonstrate proficiency at each level and pass an exam, much like drivers need to take a written exam and also pass a behind the wheel test. And like the driver's license metaphor, the KCS licenses should be renewed on a regular schedule.

A KCS license isn't the end of the licensing process, just like getting a license to drive isn't the end of that process. Drivers must obey the rules of the road and demonstrate good judgment, and so must KCS license holders. If a KCS Contributor consistently shows poor judgment or a lack of compliance with the content standard, they should lose their license.

Variations on KCS Licensing

While both the coaching model and the KCS licensing model are common components of successful KCS adoptions, we should note that there is considerable variation in how companies have implemented the KCS licensing model. Some have rigorous criteria and tests that knowledge workers must pass, while others rely solely on Coach recommendations. Some organizations require an annual renewal and some issue the KCS license for life.

Organizations also use a variety of combinations of levels of license. Some combine the responsibilities and competencies of the licensing levels we have outlined here. Following are a few of the variations we have seen. They all work; the variations reflect the level of trust the leadership has in the knowledge workers.

- Two-level model where the KCS Candidate and KCS Contributor rights are combined and KCS Publisher rights are distinct. Knowledge workers can create and modify Not Validated and Validated/Internal articles and, once competent, are licensed to publish External.
- Two-level model with a KCS Candidate and the KCS Contributor and KCS Publisher rights are combined. Knowledge workers have very limited rights in the system while they are learning KCS (Work in Progress and Not Validated articles only) and when they are competent they are licensed at the KCS Publisher level.
- One-level model where everyone has all the rights and privileges of the KCS Publisher and people lose their license if they consistently demonstrate poor judgment or a lack of compliance with the content standard.

KCS Coach

Coaches are critical change agents in the KCS adoption process, invaluable in helping knowledge workers develop their KCS competencies. In the KCS environment, the Coach is successful when people are moving from KCS Candidate to KCS Contributor or KCS Publisher. Although a KCS Publisher needs very little coaching, Coaches should be doing periodic quality checks on their articles.

The Coach's focus should first be on evolving an individual's KCS skills, then over time, shift to developing team capabilities. Although organizations recognize the need for training, they often overlook the need for effective coaching. An investment in training becomes largely wasted without the follow-up provided by a Coach's on-the-job reinforcement and support. This is especially true with KCS, which requires knowledge workers to develop and foster a set of new work habits, not just skills. An effective coaching program will shorten adoption time. In fact, the benefits the
organization will achieve are directly proportional to the time they invest in coaching.

Coach responsibilities include:

- Promote user skill development through effective skills coaching.
- Help the KCS Candidate understand the problem solving workflow and how the KCS article management process is integrated with the thinking process.
- Influence knowledge workers to practice good knowledge management.
- Influence knowledge workers to apply standards for creating and improving knowledge within the knowledge base.
- Review KCS articles framed by the KCS Candidate until they reach required levels of competency.
- Perform internal validation of KCS articles to ensure accuracy for the described context and adherence to the quality standards set by the organizational unit.
- Provide ongoing feedback to knowledge workers and management about organizational KCS skill development.
- Provide feedback to the knowledge developing organization, within the defined processes, to improve KCS article management.
- Develop and monitor their own coaching skills through work with head Coaches.
- Participate in the KCS Council.

The Coach must have a profound knowledge of the KCS Practices and processes as well as strong communication and influence skills. We have found it most effective to have Coaches be part-time KCS Coaches and part-time in the role of the peers they are coaching. A few organizations have tried full-time Coaches and have found that the Coaches quickly lose touch with the reality of issue resolution. As a result, the Coaches lose credibility with those they are coaching. A good rule of thumb is for Coaches to split their time equally between handling requests and KCS coaching. For more on coaching, see Technique 7.2: Coaching for Success.

Knowledge Domain Expert

As the organization matures in its use of KCS, a fourth important role evolves: the Knowledge Domain Expert (KDE). KDEs are the ones who do or facilitate the Knowledge Domain Analysis (KDA) that is defined in the Content Health Technique 5.4: Creating Evolve Loop Articles. This critical role is responsible for identifying high value articles, identifying and driving improvements in products, documentation, processes, and policies, and contributing to improvements in the workflow and content standard.

The Knowledge Domain Expert must have both technical depth in their area of responsibility and a profound understanding of KCS. The KDE looks after the health of a collection or domain of knowledge, usually a subset of the knowledge base that aligns with their general expertise. To help achieve business objectives, the Knowledge Domain Expert drives the value of the knowledge by paying attention to both the quality of KCS articles and the effectiveness of the workflow that produces the articles. The Knowledge Domain Expert assists colleagues in the collection, storage, and distribution of knowledge within and outside the organization. He or she will help determine what knowledge is important for the organizational memory and help to ensure that mechanisms exist for assessing the patterns that emerge from the content.

The Knowledge Domain Expert works closely with the Coaches and teams who have direct responsibility for maintaining
the quality and flow of content as well as owners of the products, documentation, processes, and policies. This role is instrumental in the maintenance of a coordinated worldwide team effort. The Knowledge Domain Expert also contributes input toward process automation to push information externally. Their success is measured by the impact they have on:

- Effectiveness of reuse analysis and pattern identification
- Minimizing duplicates
- Improving article utilization (internal and external)
- Increasing customer success with self-service for their domain
- Influencing the owners of products, documentation, processes, and policies
- Identifying improvements in workflow and content standard
- Identifying and supporting specific corrective actions in conjunction with coaches

Most organizations have multiple knowledge domains, depending on the variety and granularity of the products and services being supported. Knowledge domains are virtual collections of KCS articles about a product family, a function, or relating to a technology or group of technologies. Knowledge domains are seldom about one product. They are not precise or absolute in their boundaries; knowledge domains often overlap. A knowledge domain is the collection of content that makes sense to look at for pattern and clustering analysis. Therefore, the purpose or intent of the analysis defines the collection of articles that is relevant.

For each domain, one or more subject matter experts emerge as Knowledge Domain Experts—knowledge workers with enthusiasm for the technology or function and the KCS principles and practices. They are usually experts who continue to have the same responsibilities, but take on additional responsibilities for the overall health of the knowledge and success of the team. They are often excited about being able to provide development with actionable information based on a broader view of customer experience. Knowledge Domain Experts often become experts in the knowledge base tool being used and develop an understanding of the subtleties of the search technology.

The reporting structure for this role can be designed in several ways. Consider the focus of the Knowledge Domain Expert's role—that of creating organizational value through externalization of content outside the organization. They will work closely with product development and product management. You may want to consider filling this role through a cross-organizational position.

Responsibilities include:

- Ensure efficient and effective problem solving by the team.
- Apply expertise in data mining to perform trend analysis and find the significant patterns in the data.
- Assist in the fundamental development and maintenance of knowledge base quality and flow, including the knowledge base quality methodology, article standards, and process guidelines.
- Perform Known vs. New Analysis
- Develop and analyze reports on key metrics for business value of the knowledge base, such as article reuse rates, web-enabled call avoidance, and improvements to resolution times.
- Ensure effective knowledge base operations by monitoring related information (organizational effectiveness, resource allocation, new article creation trends) and making recommendations to management to accommodate changing conditions.
- Advocate for changes necessary to maintain the knowledge base as an effective tool for achieving business

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objectives.

- Provide input for items that have a worldwide impact. For example, monitoring and defining the KCS article metadata, prioritizing enhancement requests, coordinating training efforts where feasible, and planning for upgrades and systems integration enhancements.

- Influence the owners of products, documentation, processes, and policies to make improvements

- Participate in the KCS Council.