Improve Customer Service Training and Operations With Knowledge Management

Bloomfire

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Introduction

$41 billion. That's the estimated annual dollar amount that U.S. businesses lose because of poor customer service, according to a study from NewVoiceMedia.[1]

It's not just this dollar amount that should scare you. Poor customer service can do serious damage to your brand's reputation, lead frustrated customers to share their negative experience with other shoppers, and cause once-loyal customers to defect to competitors.

On the other hand, exceptional customer service can have a far-reaching positive impact. When customers have a good experience with your brand, they're more likely to continue buying from you. Increasing your customer retention by just 5 percent can increase profits anywhere from 25 to 95 percent.[2]

Whether you're a Director of Call Center Operations responsible for a B2C contact center that handles a large volume of calls or a B2B customer service manager overseeing a team that works with strategic accounts, improving the customer experience is no doubt top of mind. And one of the most effective ways to elevate the customer experience is to make knowledge management part of your customer service training and your employees' daily workflow.

Creating a culture of knowledge sharing within your customer service department requires adopting a knowledge-centered service (KCS) approach and choosing technology that enables knowledge sharing and discovery. In this guide, we'll look at how you can use a KCS approach along with a knowledge management platform to centralize the information your service reps need.

By introducing this approach in your training and encouraging reps to use your knowledge sharing platform whenever they need to find answers to customer questions, you'll empower your reps to help customers quickly and confidently.

Increasing your customer retention by just 5 percent can increase profits anywhere from 25 to 90 percent.

The Changing Expectations for Customer Service

The ways we communicate with our customers continue to evolve, and customers now expect immediate, round-the-clock support. They may use multiple channels— including phone, chat, email, and social media— to get assistance, and they expect consistent communication across each. And while they may choose to speak to a customer service rep when they have a complex issue to resolve, they want self-service options when they have simple questions.

Increasingly, customers are also turning to online communities and forums where they can ask for help from both customer service representatives and other customers.

While the channels for customers to reach your brand are proliferating, customers still expect friendly, personalized service, no matter how they contact you.

Following up quickly and directly with a customer who tweets at you about an issue they're experiencing is just as important as responding to a customer who fills out a support ticket on your website or calls your support number.

- What all this means is more pressure for customer service employees to:

- Have the answer to customer questions at their fingertips so they can respond quickly

- Know where to find the right resources to share with the customer

- Know how the customer has engaged with their business before so they can provide the best possible experience

Because so much of a customer service agent's job revolves around finding and sharing information quickly, knowledge management must be baked into your company's customer service training—both during the onboarding process and as part of ongoing operations.

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Why Knowledge Management Must Be Part of Your Customer Service Training

Knowledge management is the practice of managing data, information, and knowledge so that employees can stay aligned and do their best work. It sounds simple, but all too often, companies fail to implement a knowledge management strategy for sharing information across departments and teams. This can lead to issues including knowledge silos, inefficient customer service training, and lost productivity, all of which can negatively impact your customer service operations, staff, and company as a whole.

Key Problems of Poor Knowledge Management in Customer Service

Knowledge Silos

Knowledge silos occur when individuals or departments hoard information that could benefit others. This can occur because employees feel territorial about their knowledge, but more often, the root cause is that employees don't have an efficient way to share their knowledge with others.

One of the biggest dangers of silos is that they will prevent a unified customer experience.

A customer might share information with one customer service representative but then get transferred to another team member without any context, leading to the frustrating experience of having to repeat what they've already shared. Or, even worse, a customer service representative might share information with a customer based on what they think is the most up-to-date documentation, only to have another rep later contradict what they've said based on a newer version of the same document. This can damage your customers' trust in your brand and may even cause them to take their business elsewhere.

In addition to damaging your company's reputation, knowledge silos can take a financial toll. In fact, Fortune 500 companies lose an estimated $31.5 billion per year by failing to share knowledge across their teams.[3]

Poor Customer Service Training Experience

Without a clear knowledge sharing strategy, customer service managers risk reinventing the wheel with each new hire. New employees may not know where to find the information they need, causing their managers to waste time answering the same questions over and over again. And without an easy way to revisit the content presented in training sessions, new hires can forget up to 50 percent of the information they've learned in just one hour.[4] This can make training inefficient and increase the average new hire ramp up time.

Lost Productivity

Without an efficient way to search for company knowledge, the average employee spends approximately a third of their day looking for internal information. If it takes your customer service employees several hours per day to find information, that significantly reduces the number of customers they're able to assist in the course of the workday. This could also translate to delays while reps are assisting customers over the phone— and considering 60 percent of callers won't wait for more than a minute on hold, long holds aren't something your company can afford.[5]

Overcoming Knowledge Management Challenges with Knowledge-Centered Service

No business can afford the long-term costs both to their reputation and their bottom line— of poor knowledge management. Effective knowledge sharing is especially important for your customer service employees, as they are the face of your company. So how do you ensure that your customer service employees are both sharing their knowledge and accessing the company knowledge they need to assist customers?

It all starts with taking a knowledge-centered service approach— and integrating this approach into your customer service onboarding and ongoing training.

Knowledge-centered service (KCS) consists of a set of best practices aimed at creating and maintaining knowledge in work environments. It revolves around four major goals:

- Produce new content as a result of problem solving.

- Expand and review pre-existing popular content.

- Centralize up-to-date, relevant company knowledge.

- Incentivize social learning, knowledge sharing, and collaboration.

According to a survey conducted by the Consortium for Service Innovation, companies that have implemented KCS enable their support reps to find answers to customer questions faster and more frequently.[6] KCS has also been shown to speed up onboarding time, increase employee retention, and improve job satisfaction among customer service employees.

Because knowledge-centered service requires a central location for company knowledge, many companies invest in a knowledge sharing platform. A knowledge sharing platform allows users to upload content in a wide range of formats (including text documents, slide decks, PDFs, and videos). All content is deep indexed so that users can perform a simple keyword search to find information the moment they need it.

Some knowledge sharing platforms, including Bloomfire, also have a question and answer component. This allows users to ask and answer questions directly in the platform so that everyone can benefit from the information in these exchanges. When a customer asks a question, service reps can start by searching their knowledge sharing platform to see if the question has already been asked and answered. If it hasn't been asked, they can add it to the platform, growing the company's existing knowledge base and documenting a question that other customers may have later.

A knowledge sharing platform helps integrate customer service knowledge into your reps' daily workflow. However, for it to be effective, your reps must be committed to using it. The best way to encourage this buy-in is to introduce new customer service employees to your knowledge sharing platform—and the idea of knowledge-centered service—as soon as they join your company. You should also use your knowledge sharing platform for ongoing customer service training to help keep users engaged and provide self-service opportunities for professional development.

In the next two sections, we'll look at how KCS and a knowledge sharing platform can help you speed up your onboarding process and improve your customer service operations.

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Strategies for Ramping Up Your Onboarding

A great employee onboarding program can improve new hire retention by 82 percent and boost productivity by over 70 percent, according to research from Glassdoor.[7] Yet in spite of the clear benefits of an effective onboarding program, few organizations spend more than a week onboarding a new employee, and only 12 percent of employees believe their company does a great job of onboarding.[8]

Below are four recommendations to help customer service training managers improve onboarding by integrating knowledge sharing into their processes.

Introduce Your Knowledge Sharing Platform Right Away

As you hire new employees to your customer service or support team, introduce them to your knowledge sharing platform on their first day. Make sure all customer service training documents are housed in the platform so new employees know this will be their one-stop shop for all the resources they need to ramp up.

Online vacation rental company VRBO (formerly HomeAway) uses this approach with their new customer support team hires.

Elana Clift-Reaves, Content and Training Manager at VRBO, says:

"When new employees are hired, the first thing we ask is for them to get familiar with Bloomfire. This has vastly improved our onboarding ramp-up time. When new employees can't find an answer, they leverage Bloomfire's Q&A engine, and an expert can respond back to them. This in itself has increased productivity significantly."

Break Training Into Manageable Chunks

To prevent your new hires from experiencing information overload, break your customer service training into digestible chunks. Forbes columnist Jeff Schmitt advises that customer service training managers:

"Start with the basics that everyone needs to master. Emphasize what's critical to [your new hires'] success, so they know where to focus. Repeat key points constantly. And give them a written plan, so they can see a beginning and an end."[9]

If you use a knowledge sharing platform that allows you to create series, you can group related training content into series so that new hires can see the recommended order for reviewing the content— and their progress in completing the series. You might create series such as:

• Product Offerings

• Industry

• Escalation Strategy

Encourage New Hires to Self-Serve

One-off training sessions aren't enough to successfully ramp up your new hires. As we mentioned earlier, people forget up to 50 percent of what they've heard in a presentation within an hour— and up to 75 percent in a day.[10] To really make your customer service training stick, add all training content— including slide decks, video or audio recordings of presenters, written notes, and quizzes— to your knowledge sharing platform so that employees can revisit the content as needed.

When employees have questions about something covered in training, their managers should encourage them to check the knowledge sharing platform. If they can't find the answer in the existing training resources, they should ask their question in the platform so that a subject matter expert can address it. This will help new hires get in the habit of using the knowledge sharing platform to find information, rather than just tapping a busy training manager or subject matter expert on the shoulder.

Determine How You Will Measure Onboarding Success

As you develop a knowledge-centered onboarding process, you can figure out what's working (and what's not) by looking at both qualitative and quantitative metrics. For example, you could measure new hires' time to proficiency and also look at the results of qualitative surveys that you give to new hires at the 30, 60, and 90-day marks. You could also use checkpoint quizzes (which you could embed in your knowledge sharing platform) to measure new hires' knowledge comprehension and retention at different points in the onboarding process.

Establishing metrics for onboarding success will allow you to make ongoing adjustments and maximize the value of your training program. It will also help you prove the value of your knowledge sharing platform and knowledge-centered service strategy.

Strategies for Improving Ongoing Customer Service Training

Most organizations focus their training efforts on the initial onboarding process, but employees want opportunities to continue learning and growing professionally throughout their tenure with a company. And ongoing training can benefit both employees and employers. One LinkedIn study found that employees who have time for ongoing learning at work are 39 percent more likely to feel successful, 23 percent more ready to take on additional responsibilities, and 47 percent less likely to be stressed than their peers.[11]

If you're looking for ways to boost productivity and employee satisfaction on your customer service team, try using these knowledge-centered strategies in your customer service training program.

Add Customer Service Calls Recordings to Your Knowledge Sharing Platform

You may already record your company's customer service calls, but how often are those calls being used as learning tools? Try uploading a selection of customer service calls covering a variety of scenarios to your knowledge sharing platform, and give call center employees time to review these calls as part of their ongoing training. Listening to call recordings allows employees to tap into tacit knowledge that they couldn't get from a training manual. For example, call recordings can help teach employees about the right tone of voice to use when de-escalating a customer or the language that's most effective at conveying empathy.

Document Customer Stories

Encourage customer service reps to share some of their customer win stories in your knowledge sharing platform (and allow them to share these stories in the format that's easiest for them, whether that's filling out a template, recording a short video, or posting a thank you note from a customer). Other reps can review these stories to learn what worked well for their peers. In addition to being a good training resource, these customer win stories can help boost employee satisfaction by showing your service reps the impact of their work.

Plan Training Sessions Around Knowledge Gaps

Pay attention to the questions that are getting the most views and the terms that are being searched for most frequently in your knowledge sharing platform. These questions and search terms can help you identify knowledge gaps for your customer service team members. From there, you can schedule refresh training sessions and add new content to your knowledge sharing platform to help close the gap.

Offer Seasonal Training

The holiday season often brings a heavy workload for customer service reps, but you can help reduce your reps' stress by offering training on common seasonal issues. Document seasonal issues (e.g. questions about gift wrapping options, rush delivery the week of Christmas, and so on) in your knowledge sharing platform so that reps can easily access this information whenever they need it. If your company is running seasonal promotions, make sure to document all the details of these promotions (e.g. rules, exclusions, promo codes) in your knowledge sharing platform as well.

What Knowledge Management Success Looks Like for Customer Service Teams

When your company successfully implements a knowledge-centered service approach, the benefits can be far-reaching. Enabling your customer service reps to quickly find information in a knowledge sharing platform can:

- Shorten the time it takes to ramp up new hires

- Give reps easy access to resources for ongoing customer service training and professional development

- Increase your reps' confidence that the information they're accessing is up-to-date and accurate

- Reduce the time your customer service managers spend answering repetitive questions

- Improve the first call resolution rate in your call center

- Improve your customer service team's average time to resolution

Here are some real-world examples of how companies have elevated their training and customer service operations by centralizing information in a knowledge sharing platform (in this case, Bloomfire):

Orvis

Sporting goods retailer Orvis moved all their customer service documentation to Bloomfire, making it easy for their call center employees to find answers to their customers' questions as they come up. This has helped them double their first call resolution rate and deliver an exceptional experience to their customers.

VRBO (formerly HomeAway)

Vacation rental technology company VRBO uses Bloomfire as the single source of truth for all customer support documentation. They also use Bloomfire's Q&A engine to make all questions and answers searchable. As a result, their customer service specialists are saving up to 30 minutes every time they need to find support materials.

AGIA Affinity

It's essential for AGIA Affinity, a third-party insurance marketing and administration company, to keep their policies, procedures, and other customer service documentation up-to-date. If one of their customer service employees were to share inaccurate information with a customer, it could result in significant costs due to errors, remediation, and re-work. AGIA relies on Bloomfire to keep their customer service associates up-to-date and to bring new hires up to speed quickly. Just a few months after implementing Bloomfire, they saw a 50 percent decrease in the number of calls placed on hold and a 15 percent decrease in new hire onboarding time.
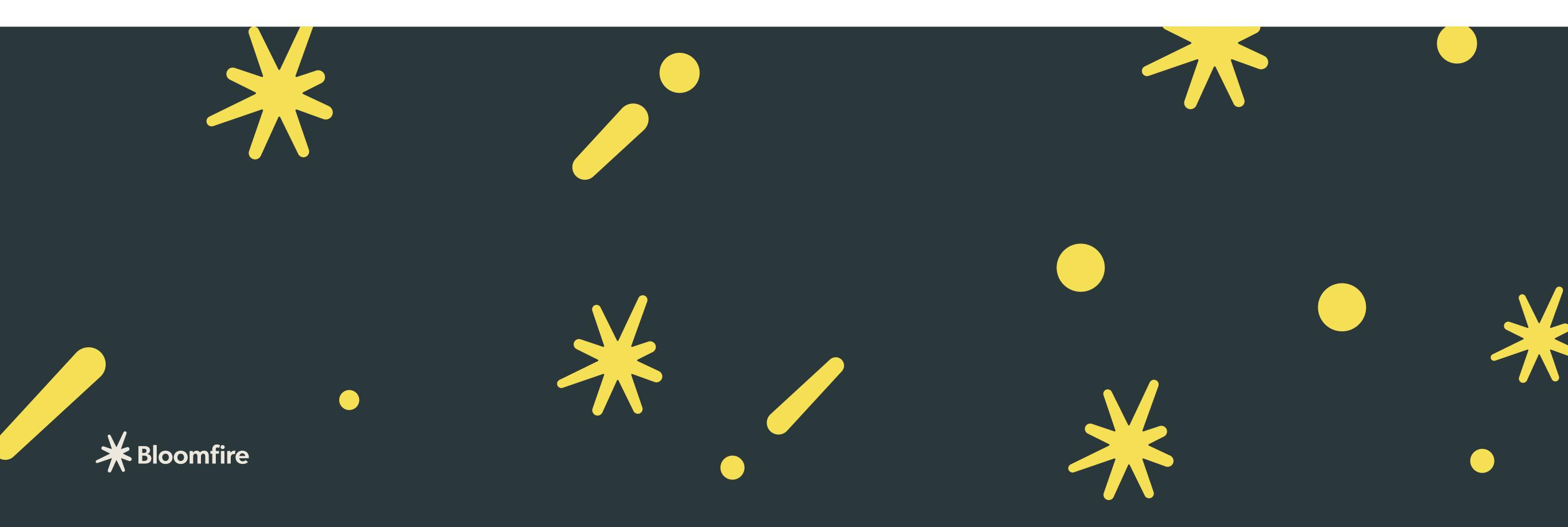
Asure Software

Asure Software uses Bloomfire across their sales, customer service, and support teams to keep everyone aligned around the same information. Product managers and marketers add content to the platform, and sales and service reps can ask questions and get answers from subject matter experts. Jennifer Health, Director of Product Marketing and Sales Enablement, says that Bloomfire has become Asure Software's go-to place for self-guided learning across teams.

Final Takeaways

Your employees can't deliver great customer service if they don't have the tools they need to quickly find answers and resources for your customers. And now that companies primarily compete on the basis of customer experience, your business can't afford to cut corners when it comes to training and enabling your customer service reps.

It's our hope that this guide has got you thinking about how you can take your customer service to the next level with a knowledge sharing strategy. By introducing a knowledge sharing platform as part of your customer service training and encouraging reps to use the platform as part of their daily workflow, you can promote a culture of democratized knowledge, which will ultimately translate to a better experience for your customers.

Bloomfire

Bloomfire is the leader in knowledge engagement, delivering an experience that connects teams and individuals with the information they need to do their jobs. Our cloud-based knowledge engagement platform gives people one centralized, searchable place to engage with shared knowledge and grow their organization's collective intelligence. For more information or to schedule a demo, visit www.bloomfire.com.

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