



# Building a Shared Knowledge Solution

GUY GALON

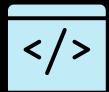
# About Me



23 Years in  
customer-facing roles: 6  
Years in London and 14  
years on planes



Lived and breathed  
Software Dev,  
Test, Deployment,  
Professional services and  
Support for  
+20 years



I love Sports  
and Writing



First novel published  
in 2021  
Second novel published  
in 2023

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VP Customer Success  
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# The benefits of an internal shared knowledge solution

1. Single source of truth for all customer-facing product/service inquiries teams.
2. Improves user experience as customer-facing teams can deliver a consistent and professional response.
3. An underlying source of information for the external knowledge base/FAQ for the end users.
4. Drives a “Customer first” mindset across the organization.
5. Supports a future digital experience and the introduction of AI to address customer’s needs.

# Who should be involved?

1. Customer Success
2. Support
3. Pre-sales
4. Professional services
5. Product

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CSMs, being at the junction between the product and the customer, can proactively promote knowledge management across the organization.

It does not mean they are the “owners” or solely responsible for the quality of the information in the shared knowledge solution, but they should be influential stakeholders as part of the process.

# The main steps to designing and building a cross-company shared knowledge solution

- **Identify the Owner**
- **Seek executive sponsorship and budget**
- **Design the data collection process**
- **Decision about Platform/Tools**
- **Accuracy and verification considerations**
- **Project Delivery**
- **Maintenance (“the day after”)**

# Identify the Owner & Seek the executive sponsorship

- One accountable owner should lead the project to deliver the knowledge management solution. The owner should come from one of the customer-facing teams.
- Avoid multiple “owners.”
- The owner should lead the project team and drive the initiative.
- The shared knowledgebase initiative should have clear objectives acknowledged by senior management
- Later in the process, the stakeholder sponsorship might be “translated” to a budget (for tools and effort).
- A few tips when “selling” internally the shared knowledge solution
  - Clarify the reasons for the initiative (data consolidation, avoiding knowledge loss, etc)
  - The expected benefits (efficiency, improved customer experience, support future scale plans)
  - The initiative should **not be** considered as “nice-to-have” and will positively impact the company’s performance.
  - It is well aligned with a “Customer First” company mindset v

# Design the data collection process

- Map the data “islands” in your IT environment:
  - Ticketing systems
  - Notes taken by different teams (stored locally or in a shared folder)
  - “Local” knowledge repositories (.xls files, Google docs)
  - User guides
  - FAQs
- Consider data categorization (using tagging) to improve search accuracy. A few examples of categorization:
  - By Customer journey phase: pre-sales, onboarding, different levels of adoption
  - By Product module
  - By Use case
  - By Customer segment/market
- Consider the interface between the internal knowledge solution and the customer-facing knowledge portal.

# Decision about Platform/Tools

- The decision on whether to implement a new tool/ technology to host the shared knowledge solution should consider leveraging existing platforms such as the support ticketing tool internal knowledge base, SharePoint, Office 365, Gsuite, etc.
- New technology has cost implications and requires integration into existing data sources, which were mapped as part of the designing of the data collection process.
- When evaluating a new technology, consider the following:
  - Flexibility to integrate additional data sources
  - The existence of an external module for the product end users
  - The ability to categorize/tag the data
  - The ability to maintain repositories for different customer segments.



# Accuracy and verification considerations

- Identify the technical authority (team or a person) to verify the accuracy of the information logged in the existing knowledge repositories
- You can also design a verification process involving multiple stakeholders who will approve and verify the data. Examples include head of support, engineering lead, pre-sales lead, and product manager.
- Design a procedure to prevent duplicates and merging of multiple answers to have a consolidated answer to the same question.

# Project consideration

- Since it might be an internal initiative that starts “small”, consider a PoC with success criteria before committing to a wider project.
- If the initiative /PoC is successful and becomes a formal project, it should have clear objectives and success criteria.
- The project team will most likely not be fully allocated as they also have their “day job.” Hence, the project timelines should assume the partial availability of the involved team members.
- Milestones should be planned to show interim progress, for example:
  - Consolidation of data from 2-3 systems
  - Consolidate knowledge of use cases/ product modules.

# Maintenance (“The day after”)

- The “**day after**” syndrome should focus on how the knowledge management solution will be maintained and updated continuously.
- The process should have internal metrics, for example:
  - # of new items added in the last x weeks/months/quarter
  - # of updated items in the last x weeks/months/quarter
- The process should include:
  - Owners who verify the accuracy of the information
  - Frequency in which existing data / new data is added to the knowledge solution
  - Reporting and updates shared with the customer-facing teams.

# Thank You



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