Knowledge dimensions:
The many factors of knowledge management in the age of disruptive work

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Burt Rea:
Welcome to Capital H, a podcast where we explore the latest trends and developments to make work better for humans, and humans better at work.

I'm your host, Burt Rea, a member of Deloitte's Human Capital consulting practice, leader of our US Culture transformation offering, and host of Deloitte's Human Capital HR Executive Dbriefs series.

The pace at which organizations have been required to respond to ever changing market forces has continued to increase at breakneck speeds. Knowledge management plays a key role in the rapid evolution of skills in organizations. It serves as a

marketplace of ideas, know how, insights, processes, procedures, policies, and other content which enables both workforces and customers to rapidly learn off of one another.

While high quality knowledge is important, the presentation of that content at the point of need provides the actual context to make it valuable. Creating systems to get the right insights to the right person at their point of need requires a different way of thinking.

In today's conversation, we'll hear from eGain's Ashu Roy, and Dell's Bruce Sanchez and our own Deloitte's Steve Lancaster Hall.

During this conversation, they'll explore the challenges of knowledge management from the three perspectives: the lens of a client who has implemented successful knowledge management systems (and still is), a software provider who is developing products in this rapidly evolving space, and Deloitte who is working to bring together these solutions for its clients.
Steve, over to you!

Steve:
Ashu, welcome to the Capital H Podcast, and Bruce, welcome back.

Bruce:
Thank you.

Ashu Roy:
Thank you, Steve. Thank you.

Steve:
Can you both give our listeners a little background on your companies and the role that you're playing within them? Bruce, maybe we start with you.

Bruce:
I really do have the privilege of working for Dell Technologies. And what I love about being here is it's a very successful company that has essentially integrated and synthesized what technology can do to drive human progress. And I know

those sound like fancy words, but we live it every day. We really think about how we can increase the human experience, and improve human progress through the technology we deliver.

And so, my role here is to be thinking in that way and to envision, architect, and design these really transformative learning and sales experiences that our quota carrying reps need to basically have to be successful in what is a rapidly changing marketplace.

Steve:
Awesome. Ashu how about yourself? Can you tell us a little bit about yourself and your company?

Ashu Roy:
We at eGain are focused on helping businesses like Dell with technology that helps improve the experience of customer engagement as well as employee engagement. And we do that with knowledge and AI technologies.

To us the opportunity of bringing technology and knowledge into the workplace to improve the employee experience and thereby, the customer engagement experience, is what we are passionate about.

Steve:
Bruce, I know it's been a bit of time since we connected last time, but can you refresh our listeners a little bit on how Dell is using knowledge to support your strategies? What makes it important for the company?

Bruce:
It's a great question. You look at the world, Steve, the world of sales, and it's changing rapidly and driven by a lot of advances in technology. Our sellers are often working in hybrid or remote environments. They're engaging online with customers, and increasingly in non-linear sales cycles.

Effectively engaging with our customers and delivering successful business outcomes for

them really requires relevant information and knowledge and the requirement to deliver that in context, at the moment of need, has never been higher.

So, when we think about our KM strategies, they're increasingly focused on what I call a service model: the ability to service in real time, our users with the right information and to proactively infer what they need at that moment in time. And to do that effectively, it takes a big bunch of powerful technologies that, luckily in today's world, we have access to.

Steve:
I remember the last time we spoke, you used an analogy of an architect to really describe the mindset you need to help pull that together, to pull that knowledge management solution together in the way that you just described.

Can you tell our listeners a little bit more about what you mean by that architect mindset?

Bruce:
You think about the core skills an architect uses—great architects can understand human needs. They can creatively envision a space that meets those needs and they can conceptualize and communicate that to a client.

And then once they have agreement on what the needs are and what's going to get built, they use an engineering mindset to essentially convert those human needs into a blueprint, which encompasses a whole bunch of very complex and interconnected systems. And then they hand that off to other people to construct.

And this is the same approach, and essentially, the same skills that I use to build KM experiences.

In my analogy, we don't usually get to build from scratch. We're often remodeling a house that already has a bunch of existing

plumbing and wiring. And so, I think it's a really useful analogy to think in this architecture mindset.

And one of the other things that's really great nowadays, is that if you think about the building materials that we have to use to construct cam experiences, really, a bunch of massive new possibilities created by very innovative technologies.

I think of things that are in our portfolio, like graph technologies, surge, ontology tools, intelligent agents and bots, voice recognition, automated translation. We have this tremendous portfolio of materials we can now apply to build some amazing KM buildings.

Steve:
It's so interesting; when we work with our clients, we are oftentimes looking across their organizations and understanding how we can stitch together knowledge that is stranded in different systems and how we build pipelines, of that knowledge to make it not only brought to that user at a point of need, but in a way that's easy to consume.

I know Ashu, as a product company, you do something similar. You're always looking at how you can optimize your own product to continue to provide value for your customers. How do you think about being a solutions architect for KM, and how your products will ultimately support their KM needs?

Ashu Roy:
The analogy that Bruce gave is a good one. I think architecture is fundamental to building good knowledge experiences. The part that I would add to that is that most clients have a whole bunch of tools in place. Especially enterprises, just as Bruce said, and these are going to be brownfield opportunities—you'll be remodeling a house.

So, when you get in, we see a lot of silos of content, a lot of perhaps legacy knowledge investments in functional areas. The way we try to simplify that is to look at the one primary objective that we can help the client with in a very measurable way.

And what we find very often is in the area of customer interaction, customer service, which is the interface at which need for correct knowledge can very much make the difference between poor customer experience, which has very clear bottom line impact, and good customer experience, which has virtual cycles built into it.

So, we tend to gravitate toward those kinds of segments of need in the larger city plan, if you will. And that gives us the way to get in and create quick value, and create those wow experiences. Start with a core of (people talk about 80/20, we jokingly say it's really 5/95.) and just that 5% that you could do well and create the experience that then has a viral effect around the organization.

So, one health insurance company, to give an example, a very large one. We started out with one customer service brand and just around that time COVID hit. And they realized very quickly that all the other brands were struggling with knowledge in the COVID environment. And this one particular group was just doing really well.

And so, they took that germ of good architecture as Bruce put it, and started to replicate it around the organization, and very quickly rolled it across all the brands. So, we see that opportunity and this way of almost creating streamlined knowledge out of a turbulent environment.

Steve:
That's fascinating, Ashu. Bruce, when you think about package products that you see from the market that are providing knowledge solutions or other solutions, I know oftentimes we talk about how there's pieces of it that you really like as a user or as a buyer. And then there's pieces of it that you really wish that you could maybe strip out.

Thinking about that architect mindset, there's times when you would want to just implement a portion of that for your users to provide that value. What is the thing that drives that consideration for you most?

Bruce:
Steve, it's a great question. One of the things we've done here at Dell is to have a big focus on reference architectures. Just like a house, or a building you're going to build, we have a very strong foundation in key platforms that are performant and deliver a lot of the capabilities that we need but are also extensible.

And so, that question you asked me about how do we think about whether we use parts of an application really gets to kind of composability and modularity. We want to be able to take our existing foundations, pick the best of what we can find that answers our users' needs, and then plug it into those foundations, plug it into that platform basically.

And so, in this world of SaaS software and being able to rent new capabilities instead of buy new capabilities, we have now, the ability to take very advanced technologies, like let's say, cognitive services, plug them into that platform and instantly enhance the user experience without a lot of backend wiring development time, et cetera.

Steve:
And Ashu, for your product, when customers come to you and they say that maybe they only want a portion of your products implemented, how do you respond to that?

Ashu Roy:
We love it because I think composability is at the heart of good solutions in the enterprise. Recognizing, as Bruce said, large organizations would like to have a composed solution rather than a monolithic one.

You can bring in, for example—clients have brought in AI modules and chat bots and cognitive services, as Bruce said, from other providers. And we can plug those in, into our application stack, still delivering the sort of experiences either through UX or through APIs that you would expect.

And so, just yesterday, interestingly, we announced its relevant, and are connected

to IBM Watson. And that's because we are finding clients who have made investments in IBM Watson technology, but they still want to converge that into the knowledge experience of their customer care or customer engagement groups. And so, that is fundamental to the way we go about helping our clients.

Steve:

So, Bruce, when we think about our clients that are just maybe at the beginning of this journey what are some guiding principles that they should be thinking about as they're starting their own process of incorporating knowledge into the flow of work?

Bruce:

It's a super question, Steve. First of all, think about the architect; what's the first thing the architect does? They understand the needs of a client. And if you ask my salespeople, "What do you need?" They actually say something really simple.

They distill it down to, "I want what I want, when I want it, and where I am." And we've talked about this before, that simple statement radiates out to a much bigger world of, "Well, how do I service you? How do I get that to you at your moment of need?"

And so, we have founding principles that basically keep us within the guardrails as we walk down that path and design those solutions.

So, first of all, knowledge is contextual and personalized. That's "I want what I want." That means you want something, not you the role, not you the abstract persona—but you the person and how can I do my best to infer what those needs are?

When I want it means, at any point in time. So, your systems always have to be on and firing on all cylinders.

And then finally, where I am; that means knowledge in the flow of work, which means information is delivered through tools that you're using at the moment that you're using them.

And so, think about that very simple human statement our sellers say, and then think about those three guiding principles and then we work backwards from there to make sure that all of the technology and experiences that we put together fulfill those guiding principles and in the end, satisfy our users.

Steve:

Ashu, how do you think about human-centered design and making sure that your products stay centered on humans as you bring them to market?

Ashu Roy:

I love that question. it's ultimately about the consumer of knowledge and what their needs are.

From there, when we get in, how do we help you realize that vision?

First of all, we try to assess the maturity of the organization in terms of bringing that knowledge, managing that knowledge, and keeping that knowledge relevant. That part is technology plus expertise, plus a lot of behavioral changes and change management that needs to be developed in the organization.

So, we try to partner with groups that have that capability. Sometimes, that's inside an organization, like we have clients who have very strong internal knowledge management groups and they do a really good job. And then we have clients where their core competence is not developed yet. So, we try to bring in complimentary partners who can help in that.

But the idea is to understand what stage of maturity that organization is at. Once you have a skill for that, then you can figure out what are the next few small, quick wins that will create excitement around the value of knowledge for the business. We talk about this three stage rocket launch process.

There is a lift-off process of a rocket and knowledge management is a little bit like that because people love it. They love the

idea of a rocket launch, but the thing is, you have to do a lot of things to get a rocket to successfully send the payload into space and into orbit in a stable form.

And so, we sort of compare it to those three stages. There's a lift-off stage, there's a boost stage, and then there is a stable orbit stage. And depending on your capacity as an organization, we will try to guide you to the right problem set that can be solved, the kind of payload that you should start with.

So, take an example of a client of ours who started out first with just looking at their new batch of customer service agents. In the hybrid world, that's becoming a big issue. People are getting hired, they're in the hybrid world, many of them are remote. They don't have that constant: a bullpen talk that they can use and chatter across the tube walls.

So, how do you make sure that the experience of those novice agents is something that they like, and what they found was when we focused it on that sort of a tactical problem, their before and after agent confidence scores went up by 60%.

So, to us, it's as much about technology as it is about understanding where the client is, and what's the problem that they should attack first.

Steve:

When we work with our clients, oftentimes, we are helping to define some personas that we'll be using and engaging with knowledge.

We use those personas to create use cases around, where they might find themselves in the flow of work, how knowledge might need to be presented, where am I going to pull knowledge versus have knowledge pushed to me.

That's a great start, but it could become such a daunting process to bring all of this vision to life that we often take a pilot approach to making sure that we're going to test, fail fast, and learn from those failures

and implement solutions that will have the most amount of traction.

As you think about human-centered design at Dell, what's the process that you think about for deploying technology with humans?

Bruce:
That's exactly our approach as well. Personas are tremendously useful. They help you design and categorize and structure, and build a framework that allows you to get even more finite in your personalization as you go. So, we're big believers in personas as well.

We're also big believers in pilots. We've developed a culture here at Dell and particularly in our L&D environment where we're willing to go out and experiment and try, we'll fail fast, we'll learn, and we keep moving forward and progress through those efforts.

And the pilots are just tremendously useful. You learn about were you on target, with the outcomes you expected to deliver and the experience you expected to deliver for your sellers? What was their feedback? What do you need to do operationally, to the point made previously, to boost and put that thing into orbit? What does it look like when it's sustainable at scale? Delivering to literally tens of thousands of sellers.

Steve:
Ashu, as you think about how you work with clients and pilot information and pilot projects—what are some of the things that your clients have a hardest time implementing outside of the technology piece?

Ashu Roy:
We have a program this is around the innovation in 30 days, it's a pilot program.

And that allows the client to test out some of their initial thoughts with a core small group of people, who would get to actually work with the production experience of that solution, and also, try out the different human experience options.

So, for instance, should the knowledge be delivered conversationally? Should it be delivered with guidance, should it be delivered based on more of a search metaphor? And what you find in these pilots is that you also shake out the personas, as Bruce said. For example, a novice persona versus an expert persona: the expert wants to deal with knowledge very differently versus a novice.

I'll give you an interesting story. One of our clients found an interesting analytic aberration that they had two different experiences for their agents in the customer service organization. One was for relatively new agents and the other was for experienced agents.

And the novice agent experience was more of a guided experience. The expert agent was more search-oriented, but it still went to the same content and got to the same answers.

Monday mornings, the adoption of the guided experience user flow seemed to go up significantly every Monday morning. They drilled into it a little bit, and they found out that these relatively younger people in the contact centers, Monday morning, many of them were hungover.

And so, they would come in and they'd say, "Just guide me to the answer. I don't want to rack my brains." It's an interesting story because it shows the importance of understanding the human principles that you have to think about.

And so, these pilots are excellent for that. And when organizations are thinking of what besides technology, I would say that mapping of their internal idiosyncrasies as a company and the technologies and expertise that is being applied, that's where the biggest opportunity of optimization and success is.

Steve:
I'm going to pivot a little bit, and Bruce, I want to start to think about how knowledge is being used at Dell. The concept of knowledge, the technology that's enabled to

deliver that knowledge into the flow of work has really been evolving.

What are some of the things that you're doing at Dell that you were not able to do before with these new knowledge technologies?

Bruce:
Yes Steve, one of the things that we've really been able to do with some of these more modern technologies is surface knowledge in new ways. Let me give you a great example.

We often think knowledge is being held in books or in texts or in documents. And a lot of knowledge sits inside of human beings. It sits inside of their heads.

And with these more advanced technologies we can actually start to pull out people who know things, rather than just links to documents or sites.

It's been really a fascinating journey as we've watched our users search for things. They often pivot to communities of expertise and specific experts because they want to find knowledge and talk to people, and not always just read and consume knowledge.

And we've been able to do that because of giant advances in graph technologies and the way that those graph technologies influence and feed through our user experiences in real time.

Steve:
As we think about that more human-centered knowledge that people are generating, one of the questions that we have is A, how do we validate that that knowledge is the right knowledge? And how do we create trust in the knowledge that's being presented into the ecosystem for people to use? Ashu, what are your thoughts around trust-based systems for knowledge management?

Ashu Roy:
And what we focus on, and I think perhaps is more amenable to technology and reengineering, is the top 20% of the total

corpus of knowledge that resides in an organization.

The idea that one can go about solving the entire knowledge space in a meaningful way, we believe has to be attacked in stages and phases. So, you have to go after the parts that are more structured, where trust can be established easier first.

And then rely on (this is our belief, perhaps more of a technologist's approach) the seamless escalation and feedback loops to experts to improve the trust on the layers of knowledge, which are constantly changing and not easily curatable. So, that's how we try to tackle this broader space of knowledge, which is fast-changing and not necessarily amenable to strict duration. [Inaudible]

Steve:
Bruce as you look to crowdsource knowledge and get the benefit of what people know within the organization, how are you thinking about how you validate what should be presented versus what is in the system that can be presented?

Bruce:
That's a great question, and always a tough one to solve. We've got a fairly robust governance structure where we think about stages of curation in governance.

For instance, let's just take our product information as an example—the source of truth for our product information comes from our product management teams. And so, if we're going to talk about what do our products do and how fast do they perform, that group has a fairly strong role in curating and governing product information.

Now, how do we talk about that product information and pitch that product information as salespeople? Now, you move a little bit more into the art and the science. And that's where we start to look for more things where we're crowdsourcing. What do our sales reps actually do with this information and knowledge in the field?

And then how do you share that amongst a community and balance out the two poles? So, I don't think we're ever going to solve that a hundred percent, but I think strong governance and some flexibility along the way are keys to success.

Steve:
Well, we're coming to the end of the podcast, just as a closing thought, what advice do you have for leaders or organizations that are early on in this journey of unlocking the potential of knowledge using AI and other technical tools, what should they be thinking about, and how should they be thinking about this journey? Ashu, maybe I'll start with you.

Ashu Roy:
This is a very relevant topic. And I say that because increasingly, people are seeing knowledge management as a space that has gotten a lot of renewed interest in the industry, in the broader economy. And businesses are looking for templates. They're looking for patterns.

Where CRM was, let's say, 25 years ago, is where I believe knowledge management is now in the sense that structured data organized around customers, as an example, has now become much more best practice oriented if you will. There still innovation, but there's a core of best practice that is underpinned by technological solutions.

And yes, you can still differentiate and so on, but it's becoming more of a system of stable execution and core to the organization. Knowledge is, I think, at that point where it's gotten a lot of renewed interest because of AI and other conversational technologies, because of a lot more data in the organization, and because of the digitalization of all these organizations.

When we go into organizations and say, we are looking at a knowledge management project, the first thing we tell them is let's go for something where we can create a wow experience. So, we get very tactical with them. So, we telescope up and down. At

the high level, it's about a more knowledge-oriented organization. That's fine.

But then you drill it down and say, "Where can you get the wow experiences? Where can you get measurement of the benefits and attributable improvements, and how can you do that quickly and repeatedly?" And we try to help them guide toward those points of initial engagement.

And then the second thing we tell them, is please bring along (you can pick us or someone else) someone who has done this several times before.

And so, a partner, whether it's at the right level of a consultative organization that can help you not just build the solution, but also maintain, enhance, and grow it. Or bring in someone internally who has the governance and technology capabilities to help in an internal organization group. So, those are the two things we try to stress.

Steve:
Great. Bruce, what about you? What advice do you have?

Bruce:
Steve, knowledge management is a discipline. Think about any discipline, the ability to write code and develop software, the ability to engineer solutions and architect discipline. They are formal sciences and knowledge management is no exception.

So, I think one of the keys to success here is to treat it as such, invest in it appropriately, and find the people and expertise that can help deliver those type of solutions.

So, just as an example, we have a full-time knowledge manager on our L&D team because we recognize the value of investing and making sure we build things in the right way. And it doesn't matter whether that's a partner, whether you hire somebody, whether you train somebody internally, treating it as a discipline and applying that discipline is absolutely critical to success.

Steve:
I want to thank you both for joining us today. Thanks for spending some time with our listeners, talking about this important topic. And I really appreciate you taking some time out today.

Ashu Roy:
Thank you, Steve. Pleasure to be here.

Bruce:
Great Steve. Absolutely.

Burt Rea:
Thanks Steve, Ashu, and Bruce. Great discussion!

We heard that in order to keep up with, and even stay ahead of the competition, organizations have had to change the very nature of how they think about the concept of "work" from static, predictable jobs to assembling the right skills together with agility to achieve the outcome of the moment.

As skills are applied to activate this disruptive work model, the knowledge and insights generated need to be captured so that others can rapidly apply lessons learned to future challenges.

Today's knowledge manager needs to not only think like a product owner, but needs to think like an architect of systems, language, people, and behaviors.

Again, a huge thank you to our guests Ashu Roy, Bruce Sanchez, and Steve Lancaster Hall for such an intriguing conversation.

In addition to tuning into our Capital H podcast series, you can read more about the many factors of managing knowledge in the age of disruptive work on our Capital H blog.

Thanks for listening and stay tuned for our next episode!

CAPITAL H
Episode 8

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