Twenty Questions on Knowledge Management (KM) at Epicor

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**Overview**

We are on pace to do something unprecedented for Epicor, which is the implementation of the Knowledge Management (KM) program.  The KM program will drive a new knowledge culture throughout our organization.  In order to successfully operate as One Epicor, we must have a robust knowledge base that allows our internal and external customers to obtain the knowledge they seek.

This FAQ will provide Epicor employees answers to the most commonly asked questions regarding our EpicCare KM initiative.

**Related Links**

[Epicor NPS Survey Results – Pie Chart](http://epicnet/sites/support/CommandCenter/Knowledge_Management/Shared%20Documents/Attachments/Epicor%20NPS%20Survey%20Results%20-%20Pie%20Chart.docx)

[Knowledge Article Classification Data](http://epicnet/sites/support/CommandCenter/Knowledge_Management/Shared%20Documents/EpicCare/ServiceNow%20Knowledge%20Classification%20Data.docx?d=wc4316aa5d2fc43abb50140aa7fa219f1)

[Handling KB Tasks](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0032131)

[Submitting a Knowledge Request](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0011686)

[Knowledge Article Types in ServiceNow](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010740)

[Knowledge Management Overview](http://players.brightcove.net/2615230543001/ryzmdC85Z_default/index.html?videoId=4850631657001)

**Frequently Asked Questions**

1. **What is Knowledge Management (KM)?**

Knowledge Management (KM) is about providing answers to our customers quickly and professionally. It is about sharing solutions across products with our peers in ways that can be easily understood and acted upon. It is about embedding knowledge into our workflows so that it is available easily when and where we need it. It is about making knowledge sharing a foundation of how our organization operates.

1. **Why are we implementing a Knowledge Management (KM) program?**

We are implementing a KM program because in the Epicor NPS surveys, over fifty percent of the areas we need to improve are directly impacted by the quality of our knowledge.  To improve NPS we must improve the quality of our knowledge. Please refer to the Related Links section above to view the [Epicor NPS Survey Results – Pie Chart](http://epicnet/sites/support/CommandCenter/Knowledge_Management/Shared%20Documents/Attachments/Epicor%20NPS%20Survey%20Results%20-%20Pie%20Chart.docx). Furthermore, based on the suggestions and responses from the KM survey sent to Epicor's support delivery teams in Q4 of 2015 there is a great opportunity for us to improve efficiency with regards to our knowledge sharing.

1. **Do we have "buy-in" at Epicor?**

Yes. The state of our knowledge was intensely studied during the requirements and design phases of EpicCare.   Through the broad participation of all teams, the knowledge program has been designed, reviewed, and approved. Ian has communicated, "With EpicCare, we're developing a best-in-class solution for how we serve our customers. By the end of 2016, we plan to have a single support system operating across all products, all geographies and all businesses, together with a standard and consistent set of support processes. This will make it much easier for customers and partners to do business with us."

1. **What will happen to the existing knowledge repositories?**

We desire to have all current and active knowledge created in EpicCare by go-live. The existing databases and repositories will remain in place until we update and repurpose old content in the new tool and no longer need it.

1. **Will customers have to search in the old and new Customer Portals for knowledge?**

No. All customer facing content needs to be updated and converted to ServiceNow before go-live. Ideally, we want the customer to find the self-help article on the ServiceNow Customer Portal that meets his or her needs, so that opening a case is no longer necessary.

1. **Will ServiceNow content rely on or be developed using Combined Query Search (CQ)?**

EpicCare will not rely on CQ; however, until we recreate all pertinent content, we'll need to keep this system in place.   We want an aggressive schedule so that our need of this system ends sooner, rather than later.

1. **Is this a knowledge migration?**

No. We are not simply moving the knowledge and information from one system to the next. We are implementing Knowledge Centered Support (KCS) methodology. KCS is a set of practices and processes that focus on knowledge as a key asset of the organization, which means that we have to change the way that we look at and manage knowledge. Knowledge must be created as a by-product of problem solving, and not just a sidecar activity. We are driving a new culture at Epicor.

1. **Will solutions be auto-imported and published?**

A mass import of legacy content will significantly reduce findability. The investment of time and money to clean, write scripts, and recreate legacy knowledge is not effective or efficient. However, certain teams may find it beneficial to auto-import due to large volumes of high-value content. Nonetheless, auto-imported knowledge will still need to be recreated and formatted using the applicable template in EpicCare.

1. **Will new knowledge creation be strictly manual?**

Knowledge within EpicCare needs to be formatted and classified per the new knowledge standards that are being adopted company wide.   While we would like to simply import knowledge, that is not practical.   Each product team will need to evaluate the state of their knowledge and its readiness to be recreated.

1. **What is a Knowledge Champion (KC)?**

Knowledge champions (otherwise known as KM Champions, Knowledge Activists, Knowledge Stewards, Knowledge Coordinators, and KM Reps) are nominated by their manager in their area to be fully trained on the Knowledge application in EpicCare.  Knowledge champions perform an important role in distributing our KM messages and activities consistently across Epicor.

1. **What is the role and responsibility a KC?**

You and your Knowledge Champion colleagues in other departments will play a key role in our broader KM efforts across the organization. You will be an advocate by spreading the KM message, be a supporter of the KM initiative, help drive change management, and you will act as your department's *knowledge broker* connecting your colleagues to useful information and knowledge resources in and around your business unit.

1. **When does knowledge training occur and how long does it last?**

The KM team hosts a bi-monthly KC training that runs for two (2) weeks for an hour a day.  After the training the Knowledge Engineers will also host a knowledge article boot camp where we will begin creating actual articles as a group.  If there are Epicor business units or departments where no KC has been nominated and/or trained, then please work with your manager and notify the KM team.

1. **What is high-value content and how will it be used?**

High-value content is identified as top current issues or knowledge solutions that customers and agents constantly use. It is deemed critical because the knowledge is essential to completing daily work. KM Champions will bring their top ten high-value content to training and we will use these issues as examples during the training.

1. **Will we be able to create internal knowledge and customer-facing knowledge articles?**

Yes, Knowledge Base (KB) articles in EpicCare can be designated as customer-facing or for internal use only by simply selecting or deselecting the **Publish to Customer Portal** checkbox.

1. **What are the different types of knowledge articles that are going to be used?**

Reference article [Knowledge Article Types in ServiceNow](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0010740). We are anticipating the use of the Solution, Step by Step Procedure, Quick Reference Guide (QRG), FAQ, and Alerts article templates.  In addition, knowledge article types can be removed or added upon request.

1. **What are the defined fields or classification data in an EpicCare knowledge article?**

Please refer to the [Knowledge Article Classification Data](http://epicnet/sites/support/CommandCenter/Knowledge_Management/Shared%20Documents/EpicCare/ServiceNow%20Knowledge%20Classification%20Data.docx?d=wc4316aa5d2fc43abb50140aa7fa219f1) article for details.

1. **Does the Knowledge application in EpicCare allow attachments and multimedia content?**

Yes, the Knowledge application in ServiceNow allows attachments and multimedia content. ServiceNow supports mov, swf, avi, and mp4 video files.  You can also embed videos from elsewhere on the web (youtube, vimeo, etc) into KB articles. Epicor plans to use the Knowledge application in EpicCare to provide things like short *how to* videos focusing on specific topics of interest.

1. **What is the Article Review Cycle (ARC) process and how are KB articles managed?**

The ARC process entails the annual review and maintenance of all knowledge created in EpicCare to ensure that content is not stale or incorrect, rather current, relevant and accurate.  KB articles are managed by the KM Team and the Knowledge Champions through the use of KB tasks (KBTSK) in EpicCare.  For details, please refer to [Handling KB Tasks](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0032131).

1. **What does it mean to create a *knowledge sharing culture*?**

It's about making knowledge sharing the norm. To create a knowledge sharing culture, we must encourage everyone to work together more effectively, to collaborate and to share – ultimately to make organizational knowledge more productive. The purpose of knowledge sharing is to help an organization as a whole meet its business objectives.

1. **Who can request a knowledge article?**

Any Epicor support employee or customer can request or suggest knowledge. Please refer to [Submitting a Knowledge Request](https://epicorcs.service-now.com/kb_view.do?sysparm_article=KB0011686). However, only Knowledge Champions who have gone through the KM training are able to actually publish KB articles in EpicCare.