KCS at Endress+Hauser

Wie kann man Kollegen motivieren?

Endress+Hauser
People for Process Automation

KCS at Endress+Hauser

Endress + Hauser
People for Process Automation

WHY, WHAT, HOW of KCS at E+H

Coaching

Summary, Questions & Discussion

Endress + Hauser

People for Process Automation

Endress+Hauser in the world

The world of Endress+Hauser

We help customers around the world to run their applications and plants efficiently

Facts and figures 2018

The Endress+Hauser network

- Sales centers in 50 countries
- Representatives in over 70 other countries
- Production in 12 countries and at 26 locations
- Holding company headquartered in Switzerland
- International and regional support structures
- Worldwide uniform quality standards

Our product offerings

- Level measurement
- Flow measurement
- Pressure measurement
- Analytical measurements
- Temperature measurement
- System products and data managers
- Software solutions

Our service offerings

- Fast **support**, both on-site and remotely
- **Services** for all phases of the plant life cycle
- **Optimization** of calibration and maintenance processes

WHY, WHAT, HOW of KCS at E+H

Knowledge Management is Key to Our Service Strategy

Knowledge is the fuel, Knowledge Management is the engine of the support service transformation

Transforming support into a paid business is 1 of 3 strategic directions

Enabler

Competence level of our technicians is a differentiator [TNS] (*)
- and NOT easy to copy!

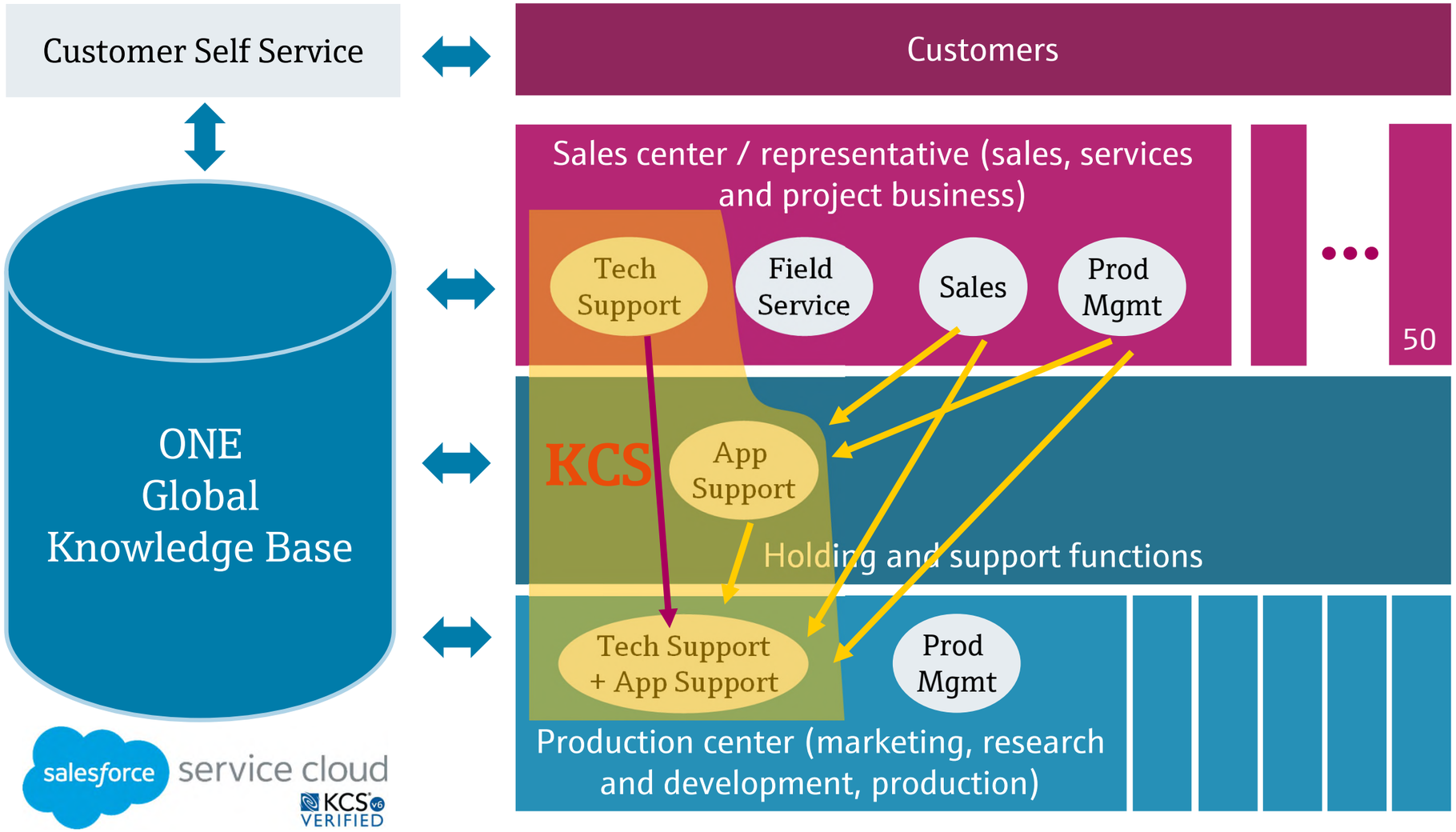
Goals in first phase

- Self-service reduces cases
  -> shift work to higher-value paid service
- Reduce time to solve
- KCS adoption as enabler

Dec 2020: KCS adoption - globally: 32%; ~25% of cases with reuse
best small >90% adoption, best big ~60% adoption.
Customer Portal being launched.

(*) cross-check with local TNS results

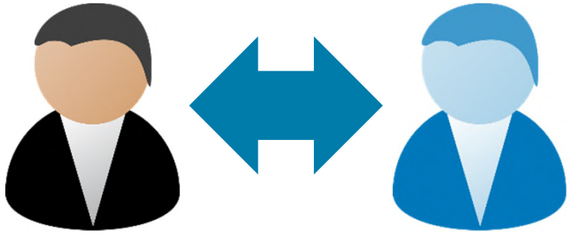
Vision around Knowledge



ONE global knowledge base used by all E+H support people with customers and internally. Customers access our global knowledge base through our customer portal with a filter.

>1100 users of ticketing system
KCS arena: ≈275 user,
10 entities with >=5 dedicated FTEs
>=14k articles in English (2/2021)

Major Changes in Day-to-Day Support Work



❶ Capture knowledge in the moment

During conversations with customers, takes notes in case in the same short & factual style as in article to enable to "add it" with hardly any editorial work on article.

❷ Search early, search often

Salesforce searches for you using information in case.
Refine/change search if necessary.
Search also in >10k English articles.
For DE, FR, CN, EN: machine translation enables finding articles across languages.

❹ "fix it"

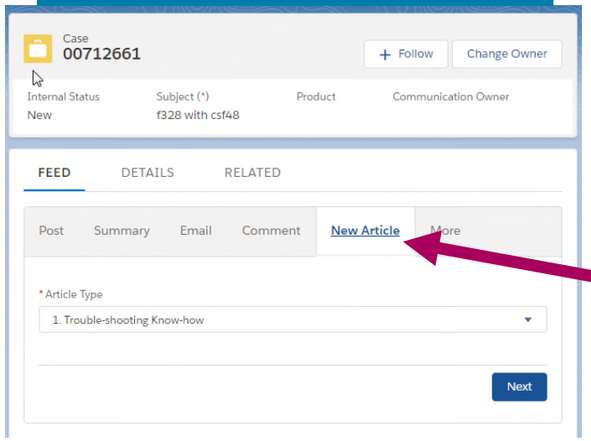
improve article [expert]

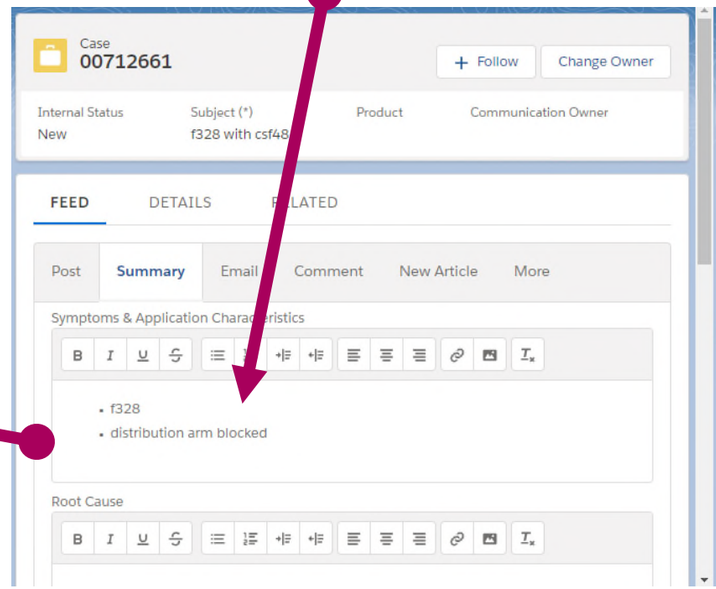
❹ "flag it"

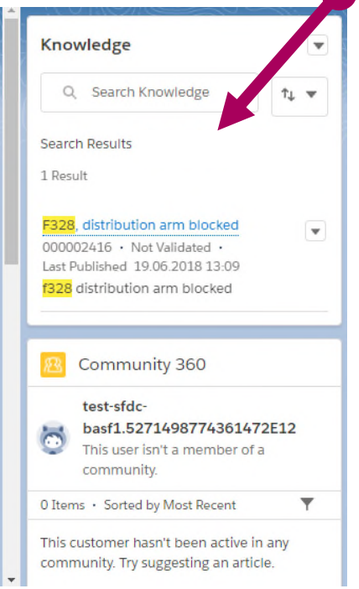
Ask next support level to clarify within case [non expert]

❸ "add it"

What is good enough for an email to a customer...
...is also good enough for a knowledge article!







❸ Translate when useful

❸ Attach article to case

Count reuse ⇔ validity of article.
Detach when no longer relevant.

Setup and Plan to „Make change happen“

Knowledge Management by E+H -- Changes with Salesforce Service Cloud and Knowledge Centered Support (KCS)

Global Approach

KCS Council

Define/refine processes around knowledge

Monitor & analyze adoption, decide actions

Improve “our” KCS + IT

time

KCS Council = cross-functional and cross-geographic group, which governs implementation and improvement of KCS

- KCS Program Manager
- Knowledge workers and management representatives
- IT Liaison
- Web Liaison

INTERNAL Slide 19 05/24/2018 Dr. Markus Nick

KCS Council – focus on bigger SCs, II, application support teams, and PCs – kick-off October 2018

KCS coaching

Knowledge Management by E+H -- Changes with Salesforce Service Cloud and Knowledge Centered Support (KCS)

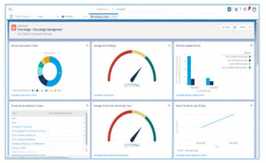
KCS Timeline per E+H Entity

KCS adoption measures *(leading through change)*

Change behavior to UFFA with every case
→ KCS process adoption indicators

Lean approach to article quality
→ AQI (Article Quality Index Process)

Strategic KPIs related to KCS
→ CSAT, Self Service



time

E+H Entity trained

E+H Entity goes live

MS: Case tracking adopted

Adoption phase: weekly checkup

E+H Entity has matured

Proficiency phase: monthly checkup

How to work with knowledge articles in SF [training PPT]

E+H KCS Key Messages

KCS Cheat Sheet

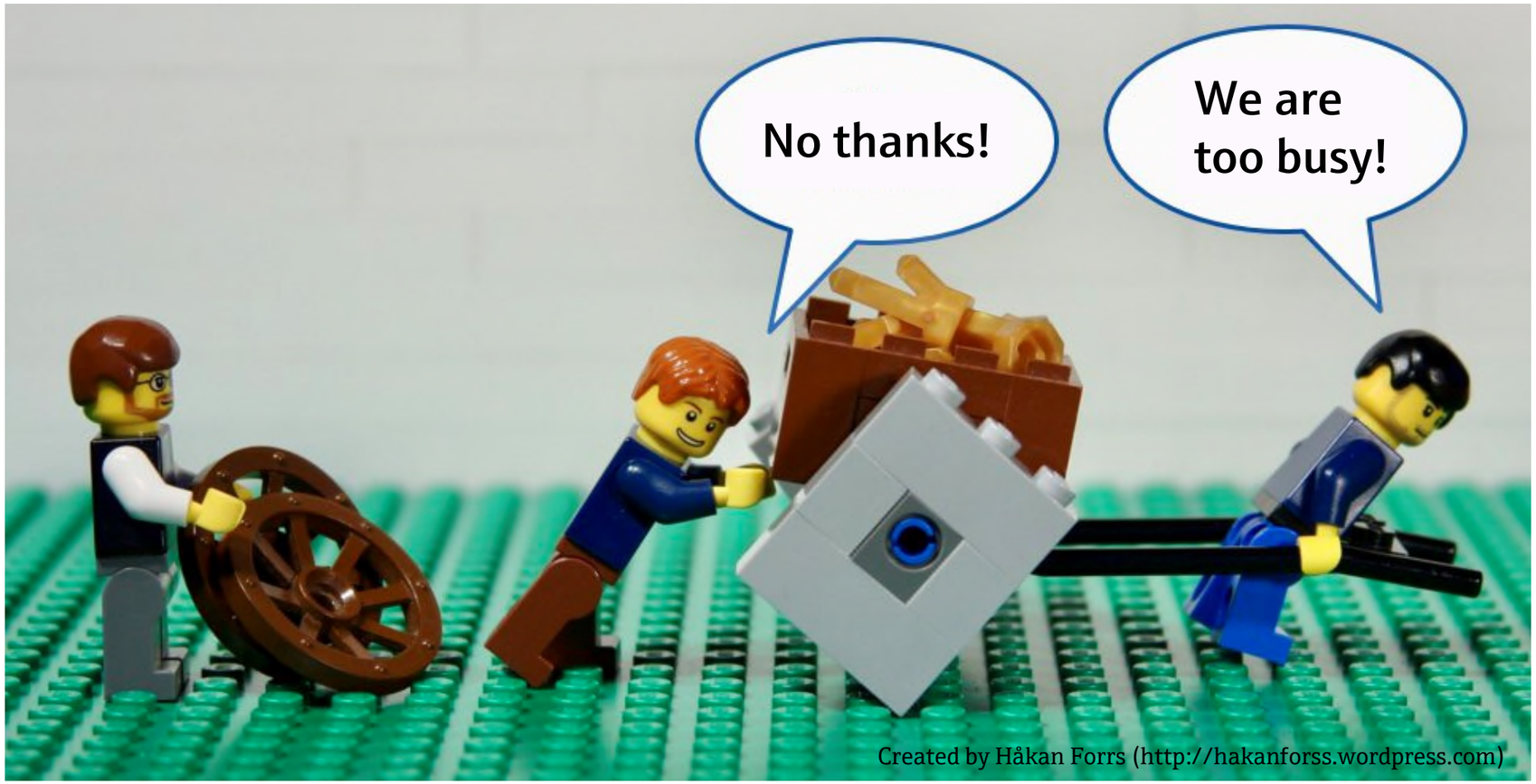
“Checkup” = Analyze, discuss, and take action towards goals & indicators – with your technical support team

INTERNAL Slide 13 07/2[illegible]/2018 Dr. Markus Nick Endress+Hauser

Support > Field Service / Sales / Marketing

Coaching

KCS is not something we do in addition to solving problems…



… Knowledge Centered Service becomes

the way we solve problems!

Die üblichen Argumente…

Ich hab keine Zeit für's Artikel schreiben, es ist grad viel los!

Ich finde die Artikel nicht, wenn ich nach ihnen suche!

Es ist viel zu aufwändig das in einem Artikel festzuhalten!

Die in den anderen Niederlassungen machen das auch nicht richtig…

Macht es wirklich Sinn dafür einen Artikel zu schreiben?
Das ist schon ganz schön speziell…

Das ist das schlimmste Tool, dass wir je hatten!

Das Tool ist noch nicht gut genug!

What’s in it for me

An Zielgruppe angepasst

Können sich ändern

Müssen allen transparent sein

Was bringt mir das? (Allgemein gültig)

Zentrale Sammelstelle

Wissen nachhaltig festhalten

Zugriff auf Wissen **aller** Kollegen

Wissen bleibt aktuell

Neue Kollegen schneller + einfacher einarbeiten

Zeitaufwand

Artikel schreiben

Lösung erneut suchen

Nicht immer die selben Fragen beantworten

Was bringt mir das? (Situativ)

Mehr Anfragen selbst lösen, ohne Eskalation

Sicherheit bei Fragen außerhalb meines Fachgebiets

“Was hinterlassen”

Gestaltungsmöglichkeit

Workload reduziert sich

Mehr Zeit für komplexere Anliegen

Re-use Moment = Glücksmoment

Was ist wichtig als Coach

- Bei allgemeinen Argumenten: nachfragen + konkret werden
- Die Motivierten nutzen
- Sorgen ernst nehmen
- Ehrlichkeit + Transparenz
- Enthusiasmus
- Glaube an das Konzept
- Fragen statt Ratschläge
- Geduld für Wiederholung

Learnings: Was würden wir heute anders machen?

In Kommunikation nicht zu sehr auf Kennzahlen konzentrieren, sondern nur als Leitfaden verwenden.

So vielen Coaches wie möglich ‘KCS Coach Development Workshop’ ermöglichen

‘WIIFM’ muss auf Knowledge Worker zugeschnitten sein
(nicht nur “Kundenzufriedenheit”, usw.)

Coaches früher Practices zertifizieren lassen

AQI, PAR und Coaching von Anfang an mit der Einführung

Mehr Zeit für Coaches

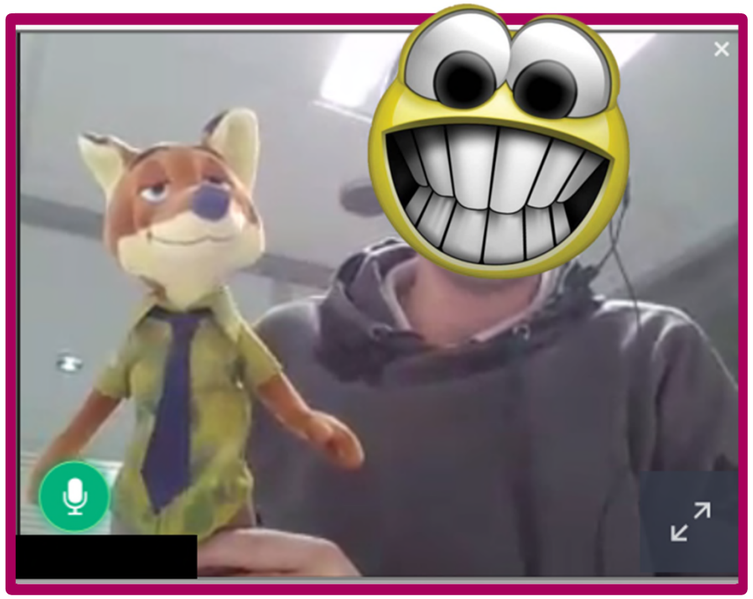
Mehr Coaches

Ideen

Wöchentliche Team-Meetings:

- Erfolge teilen
- Fragen beantworten
- Re-Training
- …

Screenrecordings
für virtuelle Unterstützung



‘Floyd’
Unser Kunde

Summary, Questions & Discussion

Summary and Challenges

Summary

- Management-buy-in for E+H Services
- KM is key element of service strategy
- KCS focus on after-sales support
- WIIFM part related to strategy, part to improvement of day-to-day work situation; consider different “personas”

Remaining Challenges

- WIIFM for highly experienced experts with long history in E+H who find information faster in their brain than in any tool.

What we would do different if we started again:

- Sticking closer to KCS method (evolve loop, training)

Questions & Discussion?

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