KCS® Roundtable

June 11, 2020

Judi Cardinal

Customer Success Manager, Coveo

*KCS® is a service mark of the Consortium for Service Innovation™

Our Speakers

Stephanie Foor

KEY Global Program Manager, SAP Concur

David Arnold

Client Support Senior Specialist, SAP Concur

Sebastian Cueto

Customer Support Consultant, SAP Concur

Cedric Martin
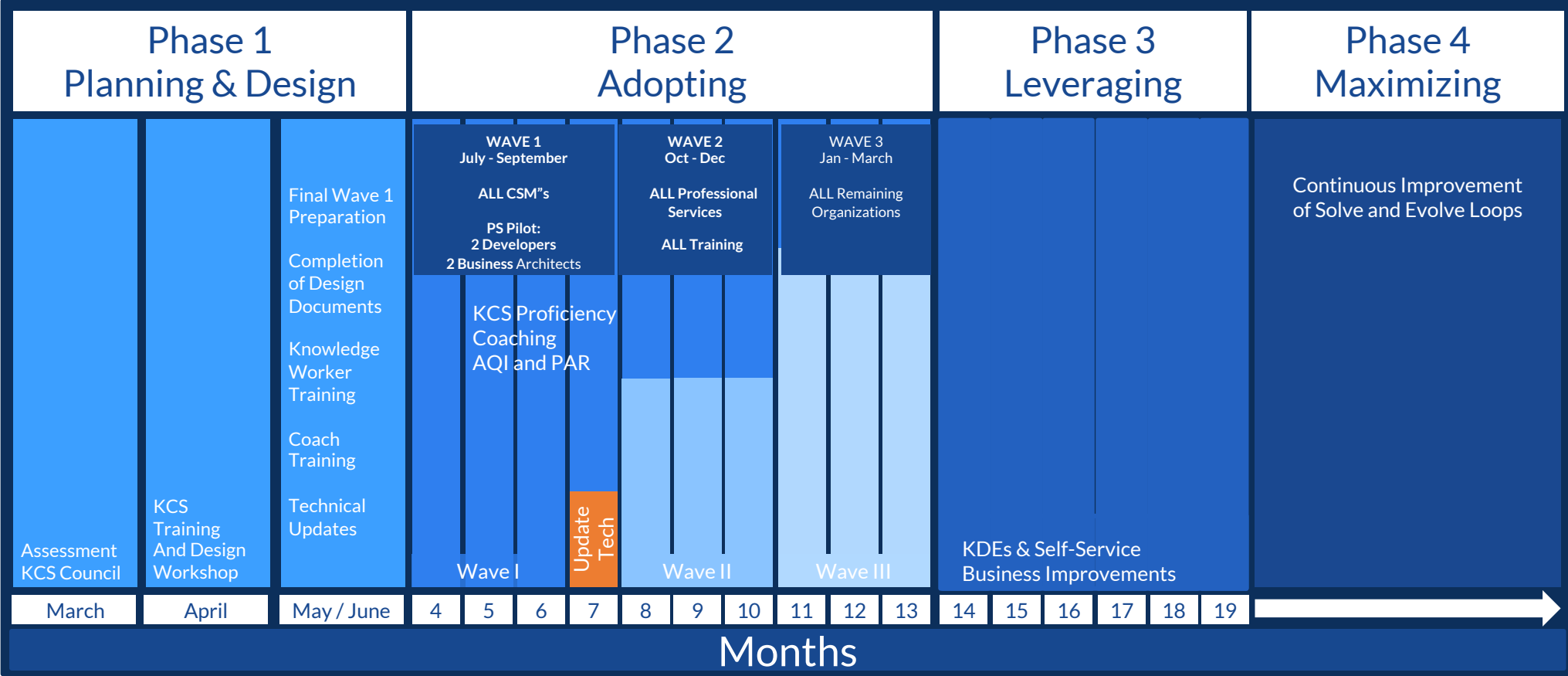
Program Manager, SAP Concur

coveo

Agenda

- Update on Coveo KCS Pilot (Non-Support)

- SAP Concur KCS Program

- Open Space

Phases of adoption

Phase 1 Planning & Design			Phase 2 Adopting										Phase 3 Leveraging						Phase 4 Maximizing

WAVE 1
July - September

ALL CSM"s

PS Pilot:
2 Developers
2 Business Architects

KCS Proficiency
Coaching
AQI and PAR

WAVE 2
Oct - Dec

ALL Professional
Services

ALL Training

WAVE 3
Jan - March

ALL Remaining
Organizations

Final Wave 1
Preparation

Completion
of Design
Documents

Knowledge
Worker
Training

Coach
Training

Technical
Updates

Update Tech

Assessment
KCS Council

KCS
Training
And Design
Workshop

Continuous Improvement
of Solve and Evolve Loops

KDEs & Self-Service
Business Improvements

Wave I

Wave II

Wave III

| March | April | May / June | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | |

Months

Pilot Status

Schedule

- On Track for July 1st
- Training
  - Knowledge Manager Training June 18th
  - Coaches Training June 22nd

Challenges

- Keeping the pilot small
- Technology
  - New SF Article Type
  - SF Article "Flag" it functionality
- Workflow for Legacy Content
- Time

SAP Concur

June KCS Roundtable
SAP Concur

Stephanie Foor – Global KCS Implementation Manager
June 09, 2020

THE BEST RUN **SAP**

Agenda

Welcome & Introductions

SAP Concur Overview

- Business Model

Knowledge & Content Team

- Global Roles | Fellowships
- KCS Organizations

KCS Pilots & Launching Importance

- Foundation | Phases | Targets
- Pilot | Feedback | IT | Tools/Resources

Aligning Coveo for Success

- KCS Connections | Ownership | Culture

Corporate History
SAP Concur

SAP Concur (formerly Concur Technologies)

- SAP SE acquired Concur Technologies
  - September 2014 for $8.3B
- American SaaS company
  - 4600+ employees
- Global travel and expense management services
  - 150+ countries

SAP Concur | C·   THE BEST RUN **SAP**

Global Knowledge and Content Strategy Team

Support Team Focused

- **Commercial Support**
  - Global
- **User Support Desk**
  - Global
- **US Government Agencies**
  - Domestic

Director, Knowledge and Content Strategy

Content Manager

Content Manager

Content Manager, Intelligent Swarming

Content Manager, Intelligent Swarming

Knowledge Content Data Analyst (Fellowship)

Global KCS Implementation Manager

Manager, Global KCS Programs

KCS Program Manager AP: Manila

KCS Program Manager AP: Bangalore

KCS Program Manager NA: USA (Fellowship)

KCS Program Manager EMEA: Prague (Fellowship)

KCS Program Manager LATAM: Brazil (Fellowship)

KCS Pilot and Program Overview
Phases & Adoption Importance

- **Phase 1 –** Planning and Design

- **Phase 2 –** Adoption

- **Phase 3 –** Proficiency

- **Phase 4 –** Leverage of the Knowledge Base

KCS Adoption – it starts with a foundation
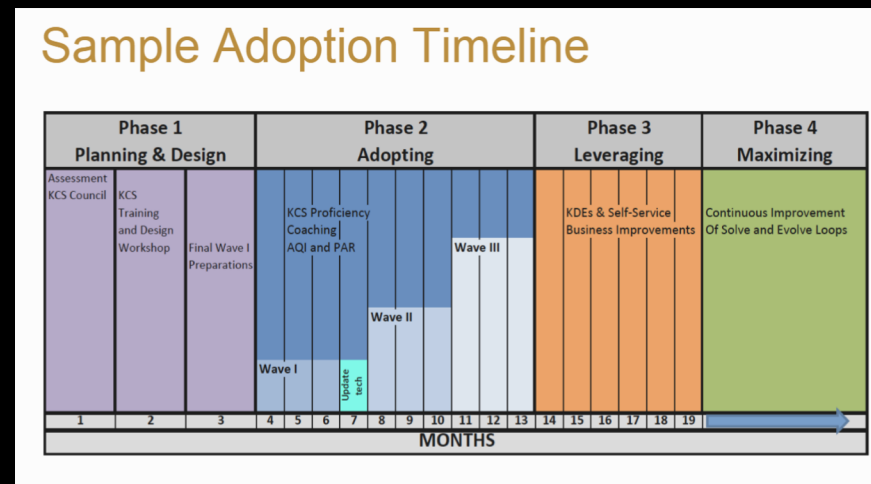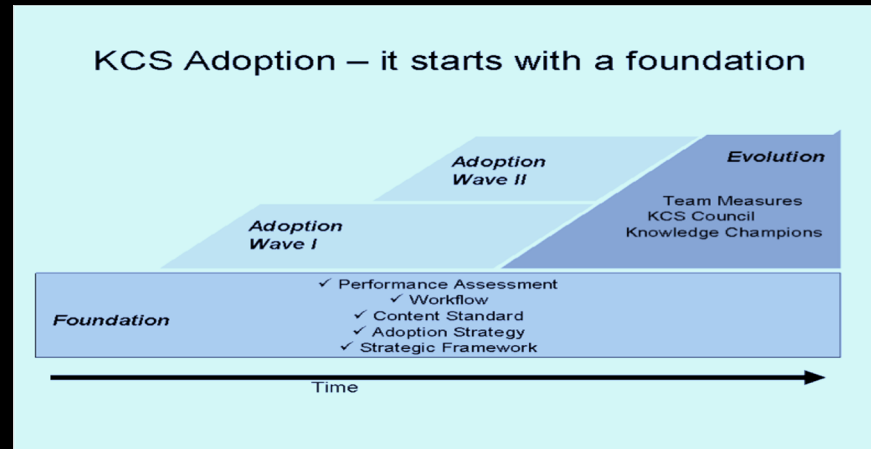
KCS Benefits and Success Measurements

Phase	Focus	Measurements
1. Planning and Design	• Build tools required for successful adoption • Gather baseline measurements • Set realistic internal and external expectations	• Executive sponsor buy-in • First draft of project deliverables
2. Adoption	• Create internal understanding and excitement through initial competency • Establish internal referenceability	• Ration of known to new incidents • Participation rate • Solution quality index • Competency profile
3. Proficiency	• Create and mature the KB • Increase process efficiency • Reduce time to proficiency • Improve collaboration and analyst satisfaction	• Cost per incident • Resolution capacity • Percentage first contact resolution • Time to proficiency for new employees and new technologies • Time to publish
4. Leverage of the KB	• Optimize resource utilization • Reduce support cost • Increase customer success • Improve employee satisfaction • Improve products and services	• Support cost as a percentage of revenue • Customer loyalty (renewal rate; new product/upgrade adoption rate) • Customer satisfaction (speed to resolution; first call resolution) • Employee satisfaction (survey) • Employee turnover rate • Self-service use (call deflection or issues resolved without assistance) • Ratio of known to new incidents being handled by the support organization • Product improvements (number of requests for enhancements accepted by product development) • Cultural health • Time to adopt new/upgraded products

Sample Adoption Timeline

Performance Model
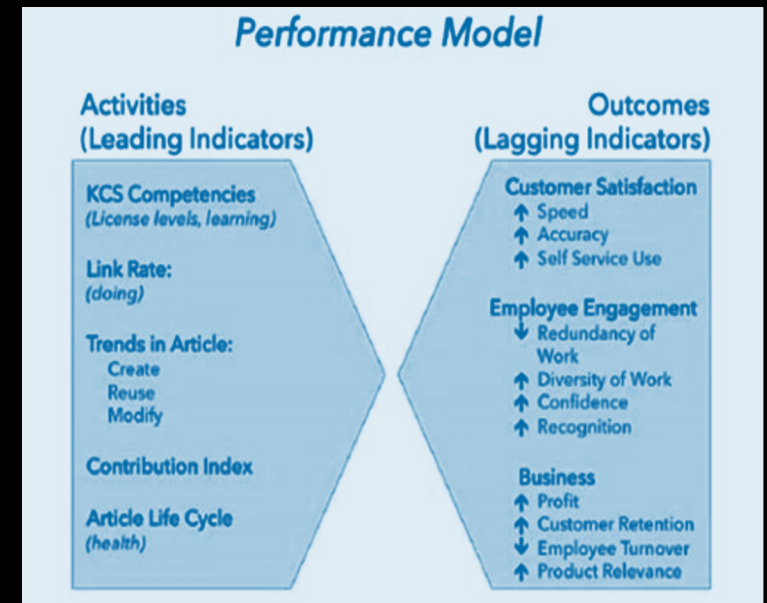
Recommended Onsite Training Schedule & Process Map

Day	Session	Topics
Monday	Management Training	New Hire Training Process Review & Misconceptions Salesforce Reporting KCS and CES Helping People Through Change
Tuesday	Knowledge Workers	What is KCS? Double Loop Process Salesforce Changes Article Fields AQI
Wednesday	Coaches	Coaching Plan Templates Milestones/Feedback Where to Find Information Coaches Lunch!
Thursday	Combined Training	Knowledge Worker Expectations/ KEY Coaches/Masters Expectations Technology/Tools Best Practices of KCS Executive Sponsor Words of Wisdom
Friday	Onsite Office Hours	Open Door Policy Questions Welcome from Team Onsite 1:1 with KCS Global PM

KCS Pilot Program Process Map
SAP Concur 2020 KEY Program

Business Analysis

Organization is Selected

Global Program Manager onsite to document Business Process Workflows

Business Model of Organization is understood & KCS can align

KCS Technical Check

Salesforce Profile check determines search logic & permissions

Salesforce Permissions check

Coveo access for knowledge & content

Coveo & KDA Analytics Meeting

Coveo analytics are run for the organization - showing Customer Portal for Demand

Knowledge Domain Analysis is run to see the current health of the KB

These both show the gap & opportunity to leadership for KCS & Coveo

Pilot Kickoff Meeting

KCS Team & Org Leadership Team meet to determine

* Strategic Framework
* Balanced Scorecard
* Content & Workflow strategy
* Knowledge Transfer strategy
* IT & business alignment
* Coaching strategy
* Communication
* Dates for Training

Onsite Training

Day 1 -Management Training

Day 2 - Knowledge Worker Training

Day 3 - Coaches Training

Day 4 - Combined Training

Day 5 - Onsite KCS Help

KCS Piloting

KCS Program Managers lead Coaches to KEY Master

Coaches lead Knowledge Workers to KEY Master (1st wave of adoption)

Feedback/Communication workflows are shared & implemented within Pilot workflow

■ Pilot Prep Work
■ Pilot is Live

Foundational Documents
Baseline Measurements Gathered & Prepped

Baseline Measurements
- **Balanced Scorecard**
  - Strategic Framework
  - Exit Criteria - Phase 1
- **Cultural Baseline**
  - Survey

Audience Focus	Objectives	Measures
Customer	▪ Customer loyalty ▪ Customer satisfaction (speed of resolution) ▪ Time to adopt new/upgraded products	Org Reports SF Reports Coveo Analytics SF Reports
Employee/Capability	▪ Employee satisfaction/loyalty ▪ KB quality ▪ Knowledge transfer ▪ Employee turnover rate ▪ Time to proficiency for new employees and new technologies	Coveo Analytics Adoption Rates KEY Master/Coaching Org Reports SF Reports
Financial	▪ Cost as a % of total revenue ▪ Cost per incident ▪ Resolution capacity (analyst productivity measured in incidents/month/analyst) ▪ Average work time to resolve ▪ Product improvements ▪ Increased profitability ▪ Increased revenue ▪ Lower costs	Coveo Analytics Cost analysis Org Reports Customer Satisfaction Reports
Process	▪ Incident volume ▪ % first contact resolution ▪ Competency profile ▪ Participation rate ▪ Self-service / case deflection ▪ AQI ▪ Ratio of new vs. known ▪ Time to publish ▪ Average work time to resolve	Org Reports SF Reports Coveo Analytics Customer Satisfaction Reports Case Deflection

Coaching Structure
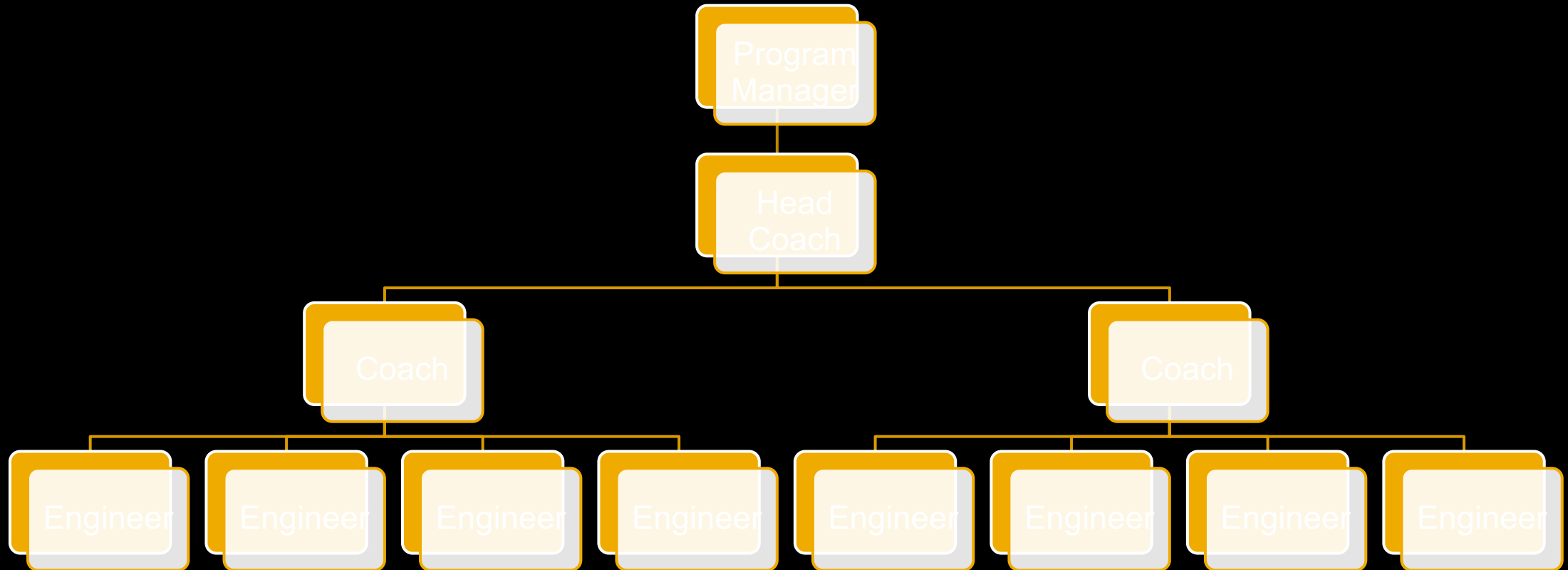
SAP Concur [C·]

Pilot Communication Plan
Change Management Initiative

THE BEST RUN **SAP**

Coveo for Support Organizations

- **Salesforce Service Cloud**
  - Analysts
- **Support Portal**
  - Customers
- **What's being clicked?**
  - Self-service
- **Is it working?**
  - Case deflection
- **Popular articles and queries**
  - Understanding customer demand
- **Queries resulting in case submission**
  - Case deflection
- **What is currently available?**
  - Support portal analysis

User Support Desk – KCS Promotion
Sonia's Story

- Started as a KEY Worker
- Published articles
- Shared her knowledge
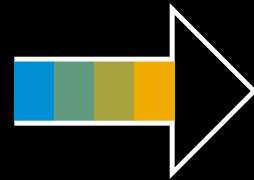
- Articles linked internally
- Articles received external views
- Recognized for her accomplishments
- Started sharing her skillset
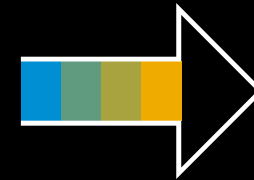
- Promoted to KEY Master
- Now a Coach
- Playing a strong role in team activities

Coveo – Driving Up User Confidence
Xi's Story

- Published articles in Mandarin
- Increased team collaboration

➤
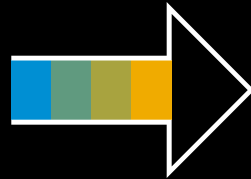
- Increased activity in article views by users in Asia
- Increased confidence
- Increased productivity

➤

- Increased case deflection
- Increased confidence in Support Portal

Coveo Insights
Enabling our Coaching Team

100%

Available Resources - Progress Tracker | KEY Opportunities Report | Tableau

100%

Technology + Accessible Documentation = Successful Coaching Structure for Change Management

34.8%

Measurements of Current Pilots - Case Deflection *(Goal is 30%)*

25.2%

Global Admin Support – Case Deflection

28.1%

Global Support – Case Deflection

419%

Global Tracking - Increase for Support Portal Visits through KCS

The KCS Games

- **Duration**
  - Two months
- **Participants**
  - Different expertise and experience worked together
  - 51 total 'tributes'
  - 10 districts
  - 'Peacemakers' in each district
- **Translation**
  - 1600+ articles translated in Spanish and Portuguese
- **Donations**
  - 24+ baskets of food/necessities donated to community
- **Fun, collaborative, competitive**
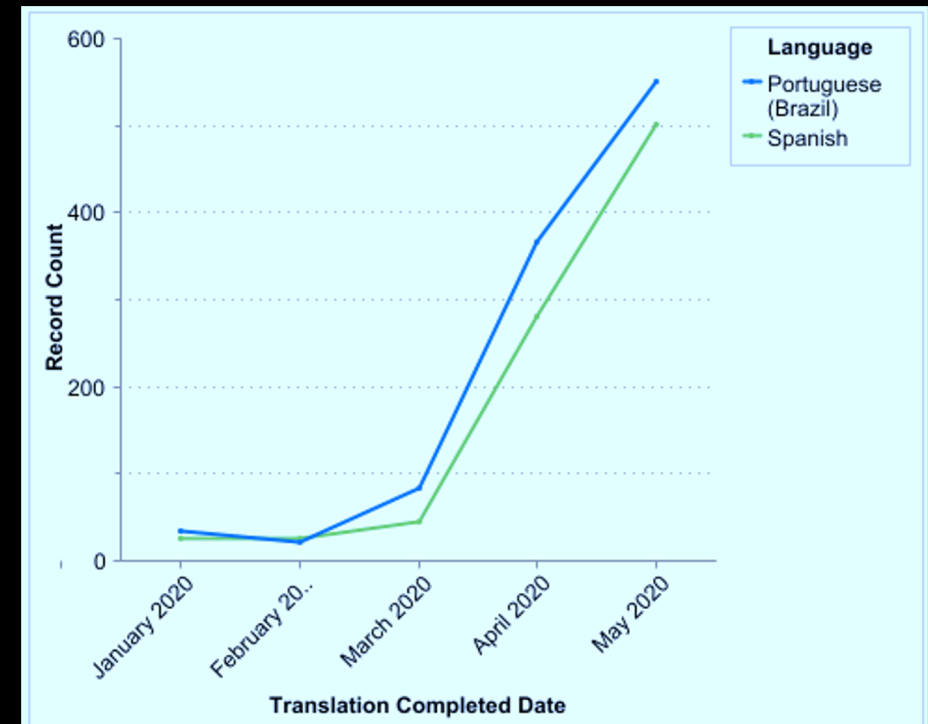
" **When we strive to become better than we are, everything around us becomes better too."**

-Paulo Coelho

Thank You.

Contact information:

F name L name
Title
Address
Phone number

SAP Concur [C·]

Follow all of SAP Concur

[f] [twitter] [youtube] [in]

Learn more at concur.com

THE BEST RUN **SAP**

Questions?

coveo™

Open Space:
What Challenges did you have in your KCS pilots?

coveo™

https://path.coveo.com

Access All Coveo Training and KCS Roundtable session recordings

Coveo Academy is Free!

- Accessible without a subscription until July 31
- Go to https://path.coveo.com
- Log in with your usual username and password
- Register using our free offer **i6yru-jganpv9x**

coveo™

Coveo KCS® Roundtable

Join our KCS Roundtable discussion group on Coveo Connect.

Coveo Knowledge Base Article #3011

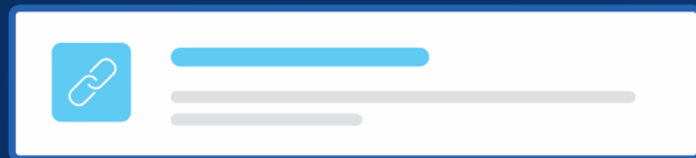| **January**	**February**	**March**	**May**
Introducing Intelligent Swarming	KCS Coach Training with Dr. Beth Haggett	KCS World Tour Silicon Valley Debrief with Wolters Kluwers	Using KCS to Enable Your Sales Organization with Jacobs Engineering

Deliver Omni-Channel Self-Service Experiences

Create a simpler, quicker and more efficient customer experience that costs less.

Hear from **Laurel Poertner, Director of Knowledge Service at F5 and Jeff Harling, AVP of Global Self Service at RingCentral**, have created an effortless customer experience across digital channels, including social, communities, knowledge bases, chat and chat bots. Join us and learn:

- How to gain buy-in from key stakeholders across your business for an omni-channel strategy
- Where AI and content help inform your day-to-day and your forward-looking strategy
- The measurable impact an omni-channel strategy has on different business areas, including effort, speed, cost and customer satisfaction

Delivering Omni-Channel Self-Service Experiences

Thursday, June 18, 2020

2 PM ET / 11 AM PT | 45 minutes

Presented By:

Laurel Poertner
Director of Knowledge Service
F5

Jeff Harling
AVP
RingCentral

Bonnie Chase
Sr. Product Marketing Manager
Coveo

Register to at webinar

Email
First Name
Last Name
Phone
Company Name
Job Title
Country

Create a simpler, quicker and more efficient customer experience that costs less

Your customers expect the same quality of service regardless of how they reach you. Each channel --

COVEO

Thank You!

coveo™

Judi Cardinal, Sr. Customer Success Manager

KCS v6 Trainer

✉ *jcardinal@coveo.com*