“Mission Possible: The Top Criteria for Successfully Completing a Knowledge Management Evaluation Assignment”

Good Morning, Mr. /Mrs. Support Professional. Your Mission, Should You Choose to Accept It:
You have been tasked with evaluating a short list of Knowledge Management vendors. The overarching goal for your organization is to increase customer loyalty, increase up-sell revenue during support incidents (when appropriate), reduce costs (isn’t this always the case?), and be able to report on customer behavior as well as on Return on Investment (ROI).

This guide has been designed to help you on your mission. You can use it as a tool to complete your Knowledge Management mission like a hero. Here you will find a collection of questions that award winning brands have used in their search for award winning support.

Rules of Engagement
A large majority of RFI’s or RFP’s begin with specific guidelines, detailed calendar events, evaluation criteria, how to respond and more. This is the opportunity for the requesting company (you) to supply the rules of engagement to the responding vendor.

General Vendor Questions
Before you become ‘serious’ with this vendor, ask questions about the company. Learn about the location, the people that you will interact with, what makes them tick. This is your opportunity to get to know your potential vendor. A few examples are:

- Company profile and background information
- Global locations
- Employee Organizational chart
- Client references & case studies
- Training methodology/professional services
- Support
- Growth
- Roadmap
- Legal actions
- Intellectual Property & Patents

“This wasn’t exactly by the book.”
‘They've got a book for this?” “They've got a book for everything.” ~Mission Impossible

“Every search for a hero must begin with something which every hero requires...a villain.”
~Mission Impossible
Product Related Questions

This is the section where the responding company has the ability to match its product offering(s) with your company’s needs and requirements. You may want to know when the product was first launched, when the next major release is scheduled, and the ability to meet implementation schedules. Here are some additional questions that you may want to consider:

- **Integration** – Does the KM solution integrate with the existing web-self service ecosystem? For example: live chat, Customer Relationship Management (CRM) software, Knowledgebase, Social Media, eCommerce platform, etc.

- **Multilingual** – Even if your company is based in North America, your clients are likely speaking many languages. Make sure your support offerings are available for your entire audience.

- **Mobile ready** – We live in a mobile world. Interesting statistics from a recent study found that more than 50 percent of mobile users own a smartphone and nearly 20 percent of U.S. households own a tablet. *A Nielsen report shows nearly half of 18-24 year olds use their smartphones while watching TV at least once per day, and 29 percent of 25-34-year-olds shop on their smartphones while watching TV.* *(Source: CRM Magazine, April 2013.)*

- **Consistency across customer channels**

- **Personalization** – Expect the responding vendor to offer options. Your questions should be general enough to allow the vendor to provide best practices and demonstrate flexibility. *“The absolute best service one can provide is the kind that detects and reacts to the customer’s input.” – Marshall Lager, CRM Magazine, April 2013.*

- **Analytics and reporting** – Standard reporting is great, custom reporting is better. Ask questions about the out-of-box analytics, but make sure that you can customize your reporting in the future. Your business is ever-changing, and your metrics tools should mirror that.

- **Required training** – Ask the responding vendor to give you an example of the typical training process. What is the curriculum? How long does it take to become ‘certified’ with the product? What is the cost for additional hours if necessary? What is the typical skill set of an administrator?

- **Implementation time line** – Here you may want to ask about the typical process to introduce the technology. You should take your own timeline into consideration, as well as the responding vendor’s timeline. Your organization should think about: Gathering required content, identifying placement, taking a snapshot of current performance, legal review, testing, and measuring the results. On the vendor’s side: Implementation, testing, and content maintenance.

- **Content management process/maintenance/customization** – Describe the tools used to maintain and/or customize the solution. This portion can get very granular. Depending on your organization’s needs, you can include questions about adding, editing and deleting content as well as workflows and roles. The goal here is to make a decision not only from a strategic value level for your company, but involve the teams that will administer the solution. Too many times companies have fallen into the trap of selecting a solution that sounds good, but ends up not delivering the specific/tactical needs of the business. Don’t put yourself in an “abort mission” position by falling into this trap.
• Technology – Allow the responding vendor to discuss the core technology – customer facing as well as server-side. Flexibility is key. Visualize yourself using this solution 5 months from now. What can it do for you and your organization? How will your customers (internal/external) interact with it? What types of activities do you want to be able to do? How can you learn from existing customers to jump start your success? Is it browser neutral? These are the questions that will help you dive deeper into the technology. Again, involve the teams at your organization that will have their hands on the technical aspects of the solution.

• Proof of Concept – We live in an era of ‘try before you buy.’ Ask the vendor if there is a pilot program and test the solution within your own environment. A Proof of Concept (POC) or Pilot is a low risk, low cost way to try the product before making a large investment.

Security
In an era where everything is hosted in the cloud, or somewhere other than your headquarters, it is imperative to follow due diligence rules when it comes to corporate security. Ask for the most updated security documentation from the responding vendor. This can include things like:

• Business continuity and security
• Service Level Agreement (SLA)
• Risk Types and Management
• Notification Process
• Recovery Procedure

Competitive Analysis
Who are your respondent’s closest competitors? What are the key differentiators? What does the competitive landscape look like? Give your respondent a moment to flex. Listed below are some useful ideas:

• Screenshots that show and tell the strengths vs. weaknesses
• Graphs highlighting the evolution of the industry
• Comparison charts
Pricing & Terms
Don’t get attacked by hidden costs when you think you are safe. Search for answers to your budgetary concerns. If the product is the ‘holy grail’ in your journey, pricing is the podium that holds it steady.

- Standard pricing – what is the out-of-box pricing?
- Custom pricing - Have you discussed alternate options for pricing? If not, should you have this discussion?
- Setup fees/Implementation fees
- Usage Fees
- Hosting Fees
- Requests for Engineering – In the future, your company may require engineering resources for integration or custom projects.
- Return on Investment Methodology and Projections – ask for specific ROI from companies in your industry with similar deployments.
- Contract terms and definitions

This Message Will Not Self-Destruct in 5 Seconds
Not to worry. If you get caught in a sticky situation, there are plenty of resources standing by. Do you think your mission will be difficult? Of course it will. But it is not mission “impossible”, this is mission possible. See below for a list of allies that will come to your rescue, should the need arise. And if you or any member of your team get caught up in the details, please contact noHold. Good luck, Mr. /Mrs. Support Professional!

Your Allies.
Esteban Kolsky, ThinkJar LLC.
Bill Rose, Inc.
Dave Brown, BolderView Systems Pty Ltd.
Knowledge Accelerators

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