



# The Road to Award-Winning KCS: A Case Study from Paychex

Paychex is a leading provider of payroll, HR, retirement and insurance services to America's businesses, serving over 590,000 clients, and more than 11 million client employees, with seventy-two products.

## What was the situation before the launch of the knowledge management initiative?

Our initial knowledge journey began several years ago. Within our service desk, knowledge was scattered across the organization and several platforms, including a common errors database, the ITSM system, shared drives, and tribal knowledge. Inconsistency of answers provided by the service desk was a common problem. The volume of contacts to the Enterprise Support service desk was growing year-over-year, and new Paychex products and services were about to be made available to the general client population. We needed to find ways to head off the expected volume increase while expanding the breadth of knowledge across all of our support agents.

## What was the knowledge management strategy?

In 2007, we made two critical decisions in quick succession: we implemented RightAnswers and made the conscious decision to follow the Knowledge-Centered Service (KCS) methodology. We were committed to making KCS part of our DNA. To that end, we held a formal kick-off introducing KCS and establishing knowledge as our product and UFFA as our focus. We trained the entire support organization and added new process roles, including KM process owners, knowledge managers, and KCS coaches.

Our initial implementation focused on our service desk, followed by the implementation of a problem management process and a self-service portal called Ask IT. As other divisions learned more about our successes, they turned to us for guidance on expanding our KM practice and building Ask IT out into an enterprise solution.

## PAYCHEX®

Paychex, Inc. is a recognized leader in the payroll, human resource, and benefits outsourcing industry, with a steadfast commitment to success and a record of achievement that continues a tradition of delivering excellence.

**Industry:** Payroll and HR Services

**Location:** United States

**Website:** [www.paychex.com](http://www.paychex.com)

### Why Paychex chose Upland:

“The Paychex customer service and HR organization needed a strong knowledge management program, with knowledge as an integral part of every customer-based interaction (emails, service requests, calls, etc.) and lead by example. Previous attempts to implement other knowledge vendors have had “less than stellar” results. Paychex IT Support had been following Knowledge-Centered Support (KCS) as its knowledge management methodology which puts knowledge as the focus of all interactions with great success. As a result, Paychex Customer Service decided on RightAnswers and the Enterprise Knowledge Hub as the clear choice for implementing a successful knowledge program using the KCS methodology to help optimize its call center activities.”

## Which processes and tools had to be implemented, modified, or leveraged to support the knowledge management strategy?

As each new division began using the knowledge base, we added their key stakeholders to our KCS Council. Each new team has their own RightAnswers portal, which enables them to limit the scope of knowledge to their clients' needs. Having multiple portals necessitated a standardized taxonomy; with over 30,000 articles, this has been no small task, and it is still a work in progress. We also had to address the risk of duplicate articles. A key factor to avoiding duplicates was to make sure everyone could see all of the knowledge that could pertain to them. Once that was complete, we placed a heavy focus on flagging and fixing articles. Key members of the Enterprise Support teams were assigned to work with the other teams to make sure they knew what already existed, how to maintain the quality of the current articles, and how to ensure duplicates were not created. This effort continues to date and is expected to be ongoing.

## What were some of the lessons learned?

### DO:

- **Gain buy-in from management.** On our initial rollout, we had the buy-in of the support organization management team. As we continued to expand and reap the benefits of KCS, we were able to show concrete benefits of KCS to the executive management team. With their buy-in, we've been able to grow this to a company level rather than just one organization.
- **Create a culture of knowledge.** The implementation of a tool was just a piece of the equation. KCS became the way we solved issues. Implement a tool that is easy to use. From the beginning, the tool we chose was fully integrated with our ITSM system. We have since integrated with other tools, including our CRM. The integration makes KCS seamless. Rather than an additional task, it can be performed while completing other day-to-day tasks.

- **Make UFFA your mantra.** UFFA has been a catchy way for us to remind our analysts how to participate in knowledge. They should be able to use, fix, flag, or add knowledge on a minimum of 80 percent incidents. This allows for things like transferring calls or the user withdrawing their incident without involvement from the analyst.

- **Report frequently enough to make it meaningful.** Reporting on a monthly basis keeps KCS fresh in the minds of our managers, analysts, and now our end user community.

- **Reward and celebrate success.** Celebrating milestones like reaching a certain number of articles added or used keep people engaged. Make it fun! Add a gamification element. In the first year of our rollout, we held multiple contests to build excitement and promote the behavior we were trying to encourage. We still hold contests to provide excitement around engaging in KCS.

### DON'T:

- **Reward the wrong behavior.** If you reward adding articles, people will add articles, but they may not be high-quality. Our rewards and contests now focus on the quality of the article based on feedback from users and reuse.

- **Run on auto-pilot.** KCS will not run itself without care and feeding. Someone needs to be responsible for keeping the culture alive and well.

- **Make it bureaucratic.** If it's difficult for people to participate, they won't. One group attempted to rollout with only one person being able to publish. All others were responsible for submitting article suggestions to the one person for review and publication. The analysts quickly lost interest and knowledge failed in this organization. About a year later, they changed their tactics and gave everyone access to create, edit, and publish articles. Since then, they've been highly successful with KCS.

- **Think too small.** We thought of KCS as an IT support tool. After a couple of years, we realized that more could be gained if the same tool was used for the company as a whole.



For more information on RightAnswers, visit: [uplandsoftware.com/rightanswers/](https://uplandsoftware.com/rightanswers/)

## About Upland

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