



## **Improving System Adoption and Compliance with Knowledge Management**

*How Performance Support Systems Boost Employee Performance*

If you're like most executives, you make decisions to invest in new processes and applications to help your organization become more efficient and maintain a competitive edge. And, like most executives, you feel the pain when employees fail to use the new applications and follow the new processes.

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Imagine a three-hour road trip you've made so many times that you no longer need to consult a roadmap, or ask your passenger to help you navigate, or pull over at a gas station to ask for directions because you're lost. Now imagine a new highway opens that will shave at least a half hour off your drive. The only problem is you don't know the new route. Even though it will save you time, you just don't feel like navigating a new way to get there. So you stick with the old familiar way. Sure it takes a little longer, but you're used to it!

Now, flash forward your road trip fifteen or so years. Today you can hit the road with your GPS programmed to guide you through the journey — even the new roads, road construction and detours. That's part of what a performance support system

does: it guides workers through the twists and turns of an organization's complex processes, rules, and systems.

Effective performance support communicates company-specific "when, what, and how" information clearly, in the fastest and easiest way possible — like a GPS unit issuing personalized, clear directions for the specific task at hand. With any mission critical enterprise system, especially CRM used by sales, service and support personnel, user adoption and compliance with the unfamiliar or new requires post-implementation support. And a performance support system, a specialized knowledge management system for documentation, will get employees going quickly and effectively on their journeys, so management achieves project success.

## Where Performance Support Fits in Your Organization

The Gartner Group describes knowledge management as "a discipline that promotes an integrated and collaborative approach to the process of information asset creation, capture, organization, access, and use" (Bair 1999). While numerous definitions exist, knowledge industry practitioners agree that knowledge management — like driving to a destination in your car — involves not just technology, but people, processes, and content as well.

Figure 1 shows three broad levels within an organization:

- Strategy
- Method
- Operations

Each area requires a slightly different approach to knowledge management. Executives often use a knowledge management approach that supports their primary functions:

- Strategic decision-making
- Risk management
- Resource allocation

And managers use a knowledge management approach to support their primary functions:

- Measuring performance
- Maximizing revenue
- Improving quality
- Reducing costs

However, one key ingredient largely overlooked in knowledge management is day-to-day operations. The front-line operational staffs, sales or customer support are typically executing multiple processes on many systems and communicating critical information to customers.

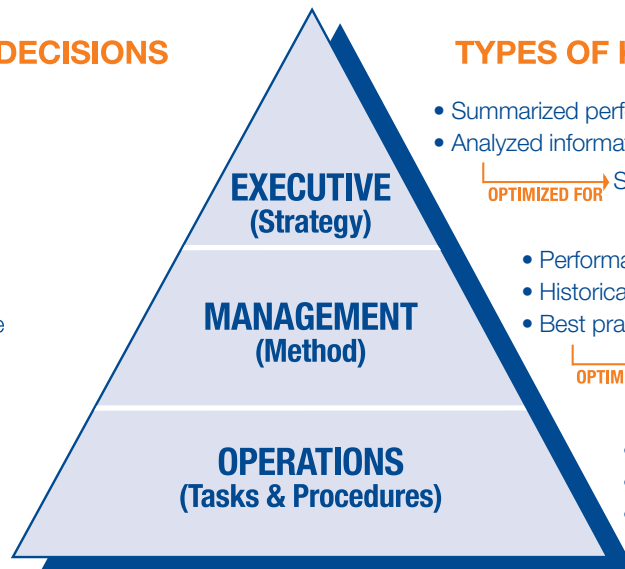
**Figure 1: Organizational and Knowledge Hierarchy**

### TYPES OF DECISIONS

- Set strategy
- Manage risk
- Allocate resources
- Measure performance
- Increase revenue
- Regulatory compliance
- Improve quality
- Reduce cost
- Perform tasks
- Follow procedures
- Execute plans

### TYPES OF KNOWLEDGE

- Summarized performance data
- Analyzed information
- ↳ OPTIMIZED FOR Synthesis
- Performance data
- Historical information
- Best practices
- ↳ OPTIMIZED FOR Comprehensiveness, collaboration & analysis
- Detailed instructions
- Data relevant to specific activity
- Policies, procedures, processes
- ↳ OPTIMIZED FOR Clarity & speed



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For example:

- A new customer support rep processes a complex order requiring multiple systems.
- A sales person opens an account using a brand new system.
- A call center agent answers an unfamiliar product-related question.

In each of these scenarios, employees need fast access to a specific instruction, policy, or piece of product information that empowers them to perform their tasks correctly, effectively, and with alacrity. In other words, they already know how to drive, and they know their general direction. All they need is the name of a road, or the distance to a certain town — a specific piece of information. And they need it now — not in five minutes, not at the end of their shift, and preferably not at the expense of asking their coworkers.

The greatest need for this knowledge occurs during times of change — especially after training with a new implementation of software, systems, procedures, processes, or new products or services. Typically, such a situation requires continuous support following the change to assure successful long-term results.

For organizations with significant turnover, the need for this knowledge is required even when there are no internal change events. In this environment, routine operations require performance support for new and “newer” employees who have to understand and execute according to standard practices. Likewise, an organization that operates with constant changes to products and services, and growing complexity in software or processes, must have a way to capture knowledge and deliver it to employees on the job.

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## The Benefits of Implementing Performance Support

If performance support is targeted at improving an operational support or change-management challenge, what realistic business benefits can organizations hope to achieve by implementing a performance support solution?

**Improved productivity:** A survey conducted in 2003 by the Ridge Group and Solis Consulting found that an astonishing 100% of employees reported having to stop work one or more times per day to look for answers to specific work-related questions. Even more staggering is the fact that 20% of respondents reported having to stop 10 or more times per day. This equates to an average of seven hours per week in unproductive time — an enormous cost to any organization.

**Improved workflow:** If an employee turns to a colleague to ask for help, not one but two people are disrupted from their core activities. And because many tasks are interrelated, the workflow may be halted until a particular task is completed. Worse, if the wrong information is entered, costly re-work is usually required to fix the error. These problems are particularly common when processes are changed following the implementation of a new enterprise system.

**Up-to-date information:** Many organizations, especially in customer-service departments, have adopted a culture of “survival of the fittest.” If employees know they can’t rely on

being able to find what they need when they need it, agents collect hard copy and electronic materials for their personal library. Accumulating information for when it is needed creates a thriving black market of unapproved and out-of-date information repositories.

Certain benefits, such as reduction in co-worker disruption and rework levels, are difficult to quantify. However, improvements in the time it takes employees to find relevant information are easier to measure and consistently show improvements of 50%.

Once employees have the information they need, performance support dramatically reduces the time it takes to act on that information. In a 2005 pilot conducted by Micron Technologies using Saba’s performance support system, Centra InfoGuide, Micron demonstrated that a performance-support approach reduced the time taken to complete a structured, system-based task by 36% compared to traditional online help. The study also demonstrated more than a 60% improvement in employee satisfaction with the support received from the performance support system.

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## Boost Project Success with a Post-Implementation Focus

Most studies of enterprise software implementations find that up to 40% of them fall short of meeting expectations. While many contributing factors are identified, a consistent theme is the lack of understanding and acceptance of the new system by end-users. A Forrester Research study reported that in 70% of failed CRM projects, the failure resulted from a lack of user

adoption of the new system and processes. (Put Enterprise Usability to the Test, Forrester Research, July 2004)

A common observation is that when employees can’t or won’t use a new system, then for all intents and purposes the system doesn’t work. So why do we see such poor acceptance rates?

The answer lies in how organizations view the adoption process. In most large change events, organizations understand the need to prepare employees through effective change management. Normally, this means communicating the timing and effects of the change, followed by detailed training prior to go-live. Project teams generally understand these processes and execute them well.

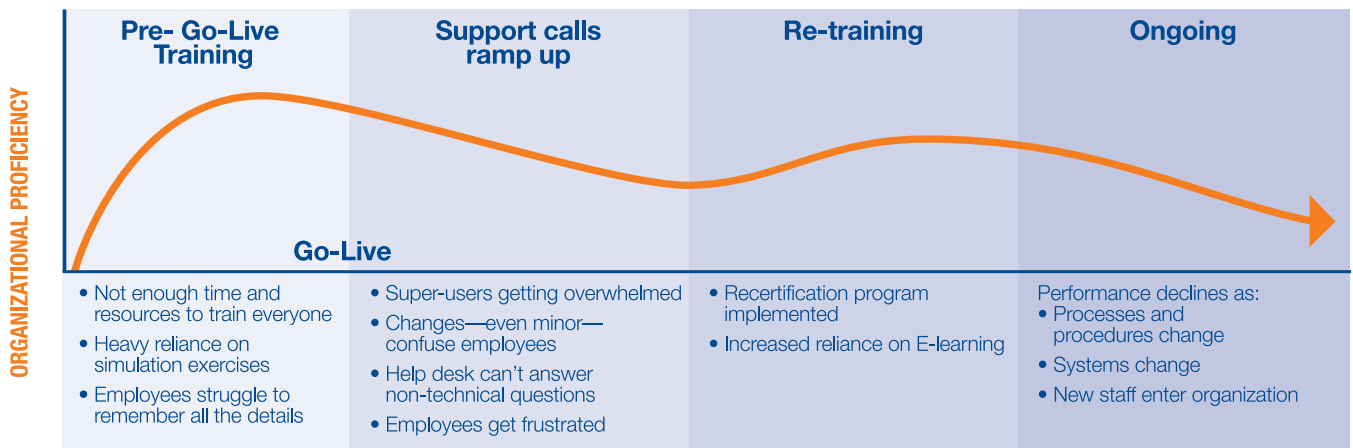
The problem materializes after go-live, when project teams are disbanded because the organization sees the project as complete. Returning to our travel analogy, that's like leaving your roadmap at home the very first time you set out on a trip. After you hit the road, you may realize that you don't remember some of your training. Without a commitment to providing

excellent post-implementation support, user acceptance rates and overall proficiency in the new systems and processes decline dramatically. Figure 2 shows this trend.

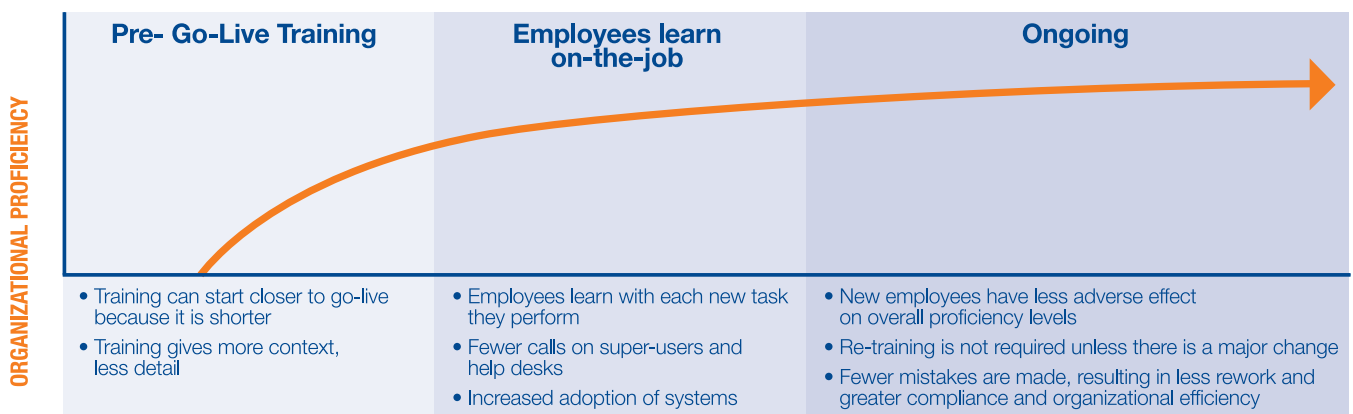
To address the decline in organizational proficiency and risk of system failure from poor user acceptance, organizations must place as much importance on supporting employees after go-live as they place on training them before go-live. Figure 3 shows the benefits of this approach.

Performance support offers a sustainable and cost-effective approach to providing support after go-live and significantly reduces the risk of an organization not achieving its targeted return on investment from the new system.

**Figure 2: Organizational Proficiency Following a Major Change Event**



**Figure 3: Organizational Proficiency with a Focus on Post-Go-Live Support**



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## Decrease Training Costs

Organizations must ensure that employees achieve required job-related competencies in the shortest time possible. E-learning expert Elliott Masie describes this as “increasing the velocity of learning.” As processes, procedures, and job requirements change, employees must be able to adapt quickly.

A 2002 study at Sara Lee conducted by Atos KPMG Consulting found that almost 80% of learning occurred spontaneously during work through on-the-job experience, networking with colleagues, and consulting instructional materials. The study categorized these types of learning as examples of informal learning. Masie (2002) also stresses “Training focuses almost entirely on formal learning, but half to 70% of learning is informal.”

It’s generally accepted that instructor-led training is a high-cost service and if delivered around change events (such

as a new system implementation), is typically single-use. It follows that high-cost formal training should be focused on areas in which training delivers most benefit — seeking buy-in to changes, developing skills and understanding, and educating employees about the critical aspects of their jobs.

Performance support, on the other hand, should direct the informal learning of facts, details, and how-to instructions. When this approach is followed, there is a direct reduction in training duration and cost. For example:

- A telecommunications company’s call center slashed its eight-week induction training to five weeks.
- A leading global IT company reduced instructor-led training of their sales representatives in the use of its new CRM from two days to two hours.

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## Decrease Support Costs

Organizations with complex systems, policies, procedures, or products spend large sums supporting employees in myriad ways. Consider the following direct and indirect support costs that organizations incur:

### Direct costs

- Help desk
- Subject-matter experts
- Intranet portals
- FAQ boards
- Tip sheets
- Updated training courses
- Refresher training (delivering and receiving)
- Update emails

### Indirect costs

- Employee time spent looking through multiple information sources
- Employee time spent staying up-to-date with the latest details
- Colleagues helping each other
- Fixing errors made by other employees
- Managers and supervisors mentoring their employees

Unfortunately, most organizations see these support costs as unavoidable. Because many of these costs are hidden or diffuse, there is less incentive to address and resolve them.

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## Conclusion

Like a GPS unit that helps you get where you’re going by the quickest, most dependable route, performance support helps keep workers on track — significantly reducing support costs. As a general rule, employees prefer to support themselves if it’s easier than alternative solutions. By providing a truly helpful, current, intuitive, and easy-to-use way to access job-related self-help, employees will use performance support over more costly alternatives like calling the help desk, searching the intranet, or asking colleagues for help.

Investing in the right applications like CRM and good processes is a start, but it may not be good enough. If sales, service, and support employees don’t use them as they should, it’s money down the drain. Performance support ensures that your workforce uses the right tools, in the right ways, and at the right times – and creates user adoption and compliance for continuous success.

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## Panviva — Developers of SupportPoint

Panviva's performance support system, SupportPoint, improves workforce competency and accelerates the adoption of new systems, processes, and products in mid- to large-size organizations. Globally, more than 50,000 users rely on SupportPoint in industries such as manufacturing, insurance, distribution, telecommunications, utilities, energy, and government services. Panviva offers products and services around the world directly and through service partners.

### About New Wave Learning

New Wave Learning specialises in the provision of informal learning solutions. Its product portfolio combined with expert consultancy and professional services enable organisations to develop and deliver solutions that provide 'moment-of-need' knowledge & information.

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