Content Management or Knowledge Management: Why It Matters to Customers
Executive Overview

In spite of some confusion about their respective roles, there are fundamental differences between enterprise content management and enterprise knowledge management. This white paper highlights the difference between the two approaches, and reveals why enterprise knowledge management is a better way to deliver consistently high-quality, efficient customer experiences.

Introduction

Customer experience has become the watchword for many companies, especially as difficult economic times ratchet up the need to attract and retain customers. This is because the customer’s experience during sales and service interactions substantially affects satisfaction and loyalty. For example, 87 percent of respondents to a Purdue University survey said that good customer service influenced their decision to do business with a company again.¹

A crucial factor in the delivery of the high-quality experience is a company’s ability to offer customers, partners, and employees successful ways to find and use information. This has become particularly important as more and more consumers regard the Web as their go-to source, especially for researching a product or service before deciding what to buy.²

Both enterprise content management (ECM) and enterprise knowledge management (EKM) can be important parts of a strategy to improve the quality and usage of information. However,

Despite having very different characteristics and functions, ECM and EKM are sometimes considered redundant technologies.

The function of ECM is central management of content—the ability to create, share, and control content through structured business processes. EKM serves quite a different function: it focuses on the process of finding specific information that is directly relevant to a user’s inquiry. EKM solutions help users navigate through large bodies of information—including content maintained in ECM systems—to pinpoint the most relevant answer.

This white paper examines the fundamental differences between ECM and EKM; how information is used during customer-facing interactions; how this affects the choice of information management systems; and why EKM is a better solution than ECM for delivering consistently high-quality, efficient customer experiences.
The Effect of Information on the Customer Experience

While companies maintain large amounts of information relevant to customers’ interests, too often it is hard to find. Agents in a call center, self-service customers, and business partners expend too much time and effort sifting through endless results lists to locate the most useful answer to a particular question or problem.

All of this has a negative effect on the customer experience. In an Accenture consumer study, respondents identified the single most frustrating aspect of customer service as agents who do not have answers. The survey listed the top concern as resolution on first contact, followed by the ability to discuss the issue with the agent and the time to resolution. On the Web, many attempts at self-service are failing, driving customers back to the phone. Jupiter Research predicts that incremental offline contacts due to failures in online service will grow annually by 18 percent through 2010.

To increase access to information during customer-facing interactions, some companies have implemented ECM. Designed to centrally manage content, ECM solutions typically provide tools to author, capture, collaboratively share, archive, and track content. As a result, ECM can help organizations overcome the restrictions of isolated systems and successfully address compliance issues.

The Key to Successful Customer Experiences: Relevancy

However, ECM does not address the fundamental issue in sales and service that affects the customer experience—how to quickly find the most-relevant knowledge for a specific inquiry.

During customer interactions, central management of large documents, authoring collaboration, and compliance are not the prime needs. It is finding the right answer that is mission critical. The goal is simple; deliver the most relevant answer to a particular question—and do so as rapidly as possible.

This is why EKM is a far better solution for managing information in customer-facing environments. EKM provides efficient ways of locating particular nuggets of knowledge so that users at all levels of skill can rapidly find answers that are most directly related to the issue at hand.

In ECM solutions, the content is paramount. The goal is to get content into the system with capabilities to store, collaboratively share, maintain, and control content.

In EKM solutions, the user is paramount. The goal is to help specific audiences get relevant information out of the system in ways that make sense to them.

Customer Experience and the Information Lifecycle

The easiest way to understand the differences between ECM and EKM and the effect on the customer experience is to examine how each technology delivers the core capabilities required to manage the lifecycle of information: creation, findability, usage, and refinement.

Content Creation

ECM and EKM solutions often provide similar functionality for content creation that contributes to the view of these as redundant technologies. Indeed, both generally support content creation and maintenance; control who can author, edit, or view content; and provide a workflow to route content through an approval process.

With EKM, knowledge creation is regarded as a natural byproduct of the day-to-day activities of agents, partners, and even customers.

ECM focuses on creation at the document level, such as manuals and Websites—information that is generally not granular in nature. Typically, authoring is a dedicated job function with a highly structured process for review, approval, and publication. The target for publication is usually one or two primary consumption points.

EKM, on the other hand, focuses on efficient creation of snippets of knowledge, such as how-to instructions, troubleshooting procedures, or product-specific answers. These snippets are more granular and directly related to a particular question: “How do I set up a voice mail account?”, “What is your late fee charge?”, or “Why are my copies streaky?”

EKM solutions embed authoring tools into the primary work process, such as the customer service representative's desktop or external discussion forums, so that users can contribute knowledge as a natural part of their current activity or job function. Workflow is designed to support quick publication to broad audiences and over multiple channels to reduce the time lag between knowledge creation and publication, a capability that is especially important when critical knowledge gaps are identified during customer interactions.

The following chart summarizes the different focus of each technology, with ECM ensuring efficient, secure creation of documents unrelated to specific issues, and EKM focusing on quick content creation needed to answer users’ questions.
TABLE 1. CONTENT CREATION CHARACTERISTICS OF ECM AND EKM

<table>
<thead>
<tr>
<th>STEP</th>
<th>CHARACTERISTIC</th>
<th>ENTERPRISE CONTENT MANAGEMENT</th>
<th>ENTERPRISE KNOWLEDGE MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Granularity</td>
<td>Pages and sites</td>
<td>Discrete snippets of knowledge; small-to-large articles related to customer inquiries</td>
</tr>
<tr>
<td>Update</td>
<td>Frequency</td>
<td>Periodic: daily, weekly, monthly</td>
<td>Frequent: immediately, hourly, at will</td>
</tr>
<tr>
<td>Typical</td>
<td>Contributors</td>
<td>Marketers, Website designers, developers</td>
<td>Subject matter specialists, agents, customers, partners</td>
</tr>
<tr>
<td>Manage</td>
<td>Delivery</td>
<td>Dedicated intranets and Website pages for uploading, publishing, and displaying</td>
<td>Integrated portlet windows available and embedded into existing Web pages and CRM desktops</td>
</tr>
<tr>
<td>Metrics</td>
<td></td>
<td>Dashboards for document creation</td>
<td>Dashboards for content usage, system satisfaction, and content gaps</td>
</tr>
<tr>
<td>Publish</td>
<td>Process</td>
<td>Formal, staged process of approvals</td>
<td>Simplified, rapid process or immediate publication without review</td>
</tr>
<tr>
<td>Users</td>
<td></td>
<td>One or two primary consumption points</td>
<td>Many consumption points based on interest; delivered over many channels</td>
</tr>
</tbody>
</table>

Findability

One of the most striking differences between ECM and EKM is the support offered to help a user find a relevant answer—the findability of information. Findability is particularly important during customer sales and service. As the Accenture consumer study illustrates, the level of capability an organization applies to quickly finding the most relevant answer significantly affects the customer experience.

Because ECM systems are designed for central content management, they provide few capabilities to increase findability. Generally, ECM offers only basic search capabilities, such as hierarchical and Google-style keyword searches. Both of these methodologies are appropriate to typical ECM users—content authors with domain expertise. However, in the support environment where the customer is waiting for an answer, these methods are too slow, as they typically produce lengthy and off-target results lists that require considerable time, effort, and expertise on the user’s part to discover the most relevant answer.

EKM solutions provide a different experience, with capabilities that help users quickly pinpoint the most-relevant knowledge. Rather than expecting the user to know exactly where to look for an answer, EKM supports efficient finding with automated and intelligent assistance throughout the search process. By managing for findability, EKM enables snippets of knowledge to be aligned to the specific inquiry and helps the user recognize the knowledge as relevant.
Advanced search techniques such as natural language processing can take into account different languages and concepts like product names and industry-specific terminology, such as the difference between the meaning of the word *stock* to a brokerage firm and a retail store.

When search is not enough, EKM solutions can collaborate with the user to increase findability. Dynamic lines of questions (LOQs) or process wizards can guide the user through a series of questions or automatically present choices that help target the search. For example, a self-service customer who enters the broad search term “fees” can use an LOQ to narrow down the potential answers. Is the customer interested in fees for checking accounts, savings accounts, or IRAs? Is the customer referring to monthly fees, late fees, or overdraft fees? By supporting the customer during the interaction with these refining questions, findability improves, increasing the likelihood that the results presented will be directly related to the question.

The most-sophisticated EKM solutions can understand the intent of a user’s inquiry using analytic trends, business rules, target knowledge sources, and dynamic portlets. These capabilities automatically discover the “true intent” of an inquiry so that the user is directed to the most-relevant knowledge source and presented with a personalized display of related options.

For example, a self-service customer may ask, “What is the latest software version for Product X?” or may instead search for *Product X downloads*, *Product X upgrade*, or *Product X software*. Typical search engines will simply use any of these keywords to search repositories for linguistic matches, such as a knowledgebase, a product documentation library stored in an ECM system, a homegrown FAQ library, software downloads maintained in the support site, and online discussion forums.

Regardless of the search term used (*download*, *upgrade*, *software*, and so on), the intent capability uses analytics to determine the inquiry intent as specifically a “software download intent.” Rather than search all the repositories, the EKM solution directs the search to the most-relevant knowledge source—in this case, the software downloads in the support site and the download page for Product X.
within the site. This bypasses the typical lengthy results list to bring the customer directly to the download page or a Product X microsite.

Information Usage

ECM's focus on centralized document management means that each document is managed as a discrete unit. The relationship of one document to another is not of great importance because the goal is to centrally create, maintain, and control each one according to established policies. Thus usage is on a document-by-document basis.

While a discrete nugget of knowledge may be needed to best answer a question, the relationship of that knowledge to other information can be of importance and value to the user. One hallmark that distinguishes EKM from ECM is the ability to dynamically link and associate different pieces of information based on the context of the inquiry. This directed knowledge capability is particularly important for online customer interactions where organizations need to be able to anticipate how well a particular piece of knowledge will answer a question submitted over e-mail or researched on the Web.

For example, the troubleshooting knowledge that explains why copies are streaky and how to fix the problem can be accompanied with related knowledge delivered through dynamic portlets, such as links to other likely troubleshooting procedures, the user manual for the particular copier, a discussion forum of customer tips for getting the best-quality copies, in-context FAQs (“Other people who asked your question have also asked these”), and even a special offer for a toner that helps to reduce streaking. All of these create a rich, supportive environment for the online customer and can substantially reduce the number of back-and-forth e-mail interactions as well as prevent Website abandonment and costly phone calls.
Oracle customers have repeatedly demonstrated the value of EKM. By implementing EKM solutions from Oracle, Pitney Bowes has reduced the time that contact center agents spend searching for information by 50 percent, and more than 75 percent of Web self-service inquiries are not escalated.

Measurement and Refinement

Both ECM and EKM systems provide strong statistical support around content. For example, both will identify the number of documents created, where each document may be in a workflow, which documents are nearing expiration, and so forth.

However, this type of reporting is where ECM systems stop, while EKM solutions offer a robust reporting and analytics environment that helps to optimize the value and use of knowledge. Knowledge can be continuously monitored for improvement by understanding its level of usefulness, completeness, and accuracy, as well as identifying knowledge gaps. Advanced EKM solutions enable this type of analysis through such capabilities as

- Diagnostic reports for content usage and gap analysis
- Metrics to track top intents and issues, hot questions, and most-popular content
- Key performance indicators for search usage and content effectiveness, as well as user feedback, user interest, and user experience
- Dashboards to track system performance and accuracy

EKM solutions combine this type of reporting with mechanisms to expand and refine content through external user participation and feedback. While ECM offers efficient routes for internal content creation, modification, and approval, EKM leverages Web 2.0 technologies to facilitate knowledge creation and improvement by broad internal and external audiences. For example, EKM solutions can trigger online surveys to capture content ratings by customers; provide discussion forums that offer peer-to-peer support; and workflow these social discussions to turn conversations into vetted and accepted answers as well as rate the quality and reliability of contributors. These capabilities continuously expand and improve knowledge by enabling frontline knowledge users—customers, partners, and agents—to contribute directly to the knowledgebase.

Conclusion

Without doubt, enterprise content management plays a useful and important role in the management of corporate information. The ability of ECM solutions to facilitate content creation, collaborative sharing, and control is vital to the development of accurate, up-to-date, and compliant information.

But when it comes to customer sales and service interactions, ECM simply does not provide the right tools for finding answers. Only through implementation of enterprise knowledge management can companies help users quickly find the precisely right knowledge to consistently deliver outstanding customer experiences.