

COMMUNICATION STRATEGIES CASE STUDY

The case study that follows is a true story of which I have personal knowledge, since I was the KM Director involved!

Read Part I first, and then answer the questions you'll find immediately following Part I. *Please* answer the questions before you read Part II! Then you can see if you agree with the Director's actions.

Part I: the problem

The organization is a medium-sized software and services company, a long-ago spin-off from Xerox that develops, markets, sells, and supports software tools for large global customers, primarily in regulated industries such as insurance and health care.

There are three departments involved:

1. The software engineers who design and develop the software tools sold to the company's customers;
2. The technical support team who answers calls from customers and helps solve their problems using the tools;
3. The consultants who help customers install and use the tools, managing and executing projects with price tags often over half a million dollars.

Ideally, there would be a natural flow of communication between the three departments, with each area learning from and providing input to the other areas. Tech support would ask the consultants how they'd implemented the software for a particular customer; the consultants would refer to the engineers for implementation best practices in specific situations; the engineers would learn how customers were actually using the software in real life; and so on in a natural give-and-take on all sides.

However, and as is often the case in software companies such as this, the three departments operated as independent silos, with the equivalent of Great Walls between them. This created significant bottlenecks in customer service for both the consultants and the tech support team, and it meant that the engineers were making, at best, only semi-educated guesses about what new features would best serve the customers.

The CEO and the VP of Sales recognized that there was a serious problem. Customers weren't getting served as quickly, efficiently, or even accurately as they should be, and customer complaints were escalating. Meanwhile, the company had

recently rolled out a new, more powerful (but also more complex) tool, and the sales organization was struggling to meet quotas – at least in part because of customer perception of poor support.

How to solve the problem? They'd tried telling the Directors of each of the three departments to “do better” at communicating and supporting the customers; it hadn't made any real impact. All three Directors firmly believed they were protecting their staff from time-wasting questions from other departments, and refused to allow their people to become involved in challenges that they felt were outside their areas of responsibility.

Something had to be done if the organization was going to continue to succeed.

They formed a fourth department under the heading of Knowledge Management, and offered the leadership role to the then-Director of the Consulting department. She was a long-term employee who had risen through the ranks of the Consulting organization, and was familiar with the problem from the internal perspective as well as from her efforts to provide quality support to customers.

She accepted the position, and after some research, she proposed the creation of an online discussion forum that would develop into a rich knowledge base. Employees from each of the three departments would write up their questions, providing all the proper technical details, and those questions would be answered by the appropriate representatives from other areas. The Knowledge Management department would take responsibility for monitoring the forum and ensuring that no question languished unanswered.

She envisioned that database would grow as questions were asked and answered. Since it would be fully searchable, it would become more and more useful as a knowledge base, so fewer questions would be asked and fewer answers would be required.

The challenge, of course, lay in getting everyone to agree to a fair trial of the knowledge base forum.

The mandate to create an effective knowledge-sharing process had come from the very top levels of the organization: the CEO, supported by the VP of Sales, the COO, and the CFO.

The various department Directors agreed with the idea in senior leadership meetings. However, outside those meetings they were unyielding in their doubt that this could ever work, and in their determination that their teams weren't going to take on any additional work. Most verbal in her opposition was the Director of the Engineering

department, who felt that her team would be bombarded with requests for help from both Consulting and Tech Support, while not gaining much, if any, value in return.



STOP READING HERE AND ANSWER THESE QUESTIONS:

1. Knowing what you know about communication styles and these four strategies, what would you do if you were in this situation?
2. How would you manage the project so that it was successful?
3. What outcomes would you expect?

PART II: THE PROCESS AND THE OUTCOME

Faced with this challenge, the Knowledge Management Director could have gone in several directions.

Given that senior leadership had stated that this initiative was a top priority, she could have laid out her plans and driven forward.

However, without the authority to compel the other area Directors to release their staff to participate, that was highly unlikely to succeed, despite those Directors' lip-service to the idea.

The deadline for implementation was tight. Nonetheless, she took the time to do follow the four strategies outlined in this Module.

1. *Don't argue with reality*

The three department Directors weren't going to change their minds just because she had been assigned this strategic initiative by the CEO.

Accepting the reality that they were skeptical of the project outcomes and resistant to encourage their teams to participate, she asked herself what she could do to help them feel more comfortable about the project's possibilities.

2. *Expect to be surprised*

She knew that most of the staff in all three departments were actually in favor of creating the knowledge base. There had been a long history of "stealth" communication between the consultants, tech support reps, and engineers.

Knowing this, and knowing that none of the department Directors were completely unreasonable people, she went into the next step with an expectation not just of being surprised, but of winning them over to agreeing with a pilot project.

3. *Find the fear*

She was very clear on the Directors' concerns, especially the Engineering Director: losing control of the schedule. Software development is always on a tight schedule. Likewise, the Tech Support and Consulting Directors were concerned that their teams would get overloaded with unnecessary and even frivolous requests for help.

(There was, as that fear might imply, a significant amount of distrust between all the Directors as to the thoroughness of each of the other teams' knowledge of the software.)

4. *Explore the Third Truth*

Armed with all of this, the KM Director had extensive private conversations with each Director and, with the Directors' permission, with the primary thought leaders (the most respected team members) in each department.

The conversations were intended to do three things:

1. Validate her understanding of each Director's concerns (fears);
2. Propose risk mitigation strategies and checkpoints to manage those concerns;
3. Collaborate and compromise in order to create a plan that would work for each Director as well as making the pilot project likely to succeed.

To everyone's surprise – except possibly the KM Director's – this strategic approach worked.

The checkpoints built into the pilot project proved that the schedules of each area were actually *improved* because problems were being solved more quickly. Even the engineers were able to resolve design and implementation challenges more effectively because for the first time they were getting answers to their questions about real-world examples. Customer service levels improved, customer satisfaction rose, and the sales team breathed a sigh of relief as they stopped hearing objections about poor service.

Years after she left the company, that KM Director would run into members of each of the three areas who would, without fail, say, “That was the BEST THING that ever happened to us!”