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Leading Change: Making KCS® a Success at Clio

Clio at a Glance:

- Leading provider of cloud-based Legal Practice Management solutions
- 150,000 customers in 90 countries
- Rapidly-growing customer base

KCS at Clio:

- Consolidated five KBs into one
- Shortened new hire ramp up time by 42%
- Solved 80% of cases with knowledge
- Reduced average case age by 31%
- Launched new 24x7 self-service capability

How They Did It:

- Active executive sponsorship
- Focus on the "why"
- Workers own the process

The Challenge

When Marc Dyer arrived at Clio, he faced a challenge. As the new VP of Customer Success, he led an organization with lots of knowledge—unfortunately, that knowledge was scattered throughout five different repositories and in every employee's head. With a customer base founded in billable hours, it's essential for Clio's support agents to be able to answer questions efficiently and effectively to ensure Clio's customers can focus on their clients. This, combined with Clio's continued growth, meant Clio's agents needed to act more efficiently than ever, and to be experts in a wealth of different needs, functionalities, and requirements for each law firm with Clio.

Beyond fixing problems, Customer Success strives to be trusted business advisors to customers, helping them receive even more value from Clio's solutions. In short, Clio needed to keep up with an ever-increasing demand for support, while also providing new offerings like chat and self-service. Fortunately, Dyer knew how to do it: an industry best practice called Knowledge-Centered Service (KCS).

About KCS

KCS is a new way of delivering service and support that makes knowledge management part of the job, not an extra task. With each customer request, team members reuse existing knowledge, capture new knowledge, or update knowledge as needed. The result is a repository of the collective experience of the organization, kept up-to-date, and written in the customer's language.

"Everyone was hungry for a more workable knowledge base."

Clio's Approach to KCS

Marc Dyer had implemented KCS with DB Kay at two previous companies, so he knew its power—and also what makes it difficult to do right. Now at Clio, Marc and his team are redefining what support looks like by transitioning the "customer service department" into trusted business partners who have fully rounded technical understanding of practice management software, its surrounding applications, as well as a sound business understanding of the legal space, a true differentiator in an industry with a variety of solutions. KCS requires a fundamental shift in how success and support staff do their jobs. Change is hard, especially when the people making the change confront a queue of urgent cases.

Start from the Top

Dyer knows that change starts from the top. So, he committed himself to be a visible and active executive sponsor, communicating the importance of KCS in team meetings, all-hands, and through one-on-one conversations.

He also invested in program management. The Manager of Customer Experience Workforce Management and Development, Marcus Stein, took over leadership of the KCS program. A big part of his job as KCS program manager was, with Dyer's support, leading change.

Focus on the "Why"

People talk about change management frequently in business, but it's often used in a vague and general way. Clio knows that this isn't an option for its KCS program.

"We're deliberate in how we apply change management — a soft but firm touch is better than a shove."

Marc Dyer, VP of Customer Success

Clio embraces a leadership framework called The Golden Circle, developed by Simon Sinek. Sinek argues that business spend too much time thinking about what they do and how they do it, and not nearly enough time on **why** they do it—what KCS calls "a compelling purpose."

Accordingly, from the very beginning, communications focused on why KCS enables Clio to become a trusted business advisor to the law firms and practitioners it serves. Leaders also talk about why a single shared knowledge repository is key to making customers as productive as possible.

Workers Own the Process

Often, business leaders design new processes, tell their workers how to do their jobs, and expect compliance. This leads to inefficiency and disengaged workers.

In contrast, Clio involved the team from the very start. They engaged DB Kay to facilitate a KCS process design workshop and included many of the workers who would be executing the new process. Workers shared their practical experiences, and they felt listed to and respected. This led to a smarter KCS workflow and a sense of ownership within the team.

Clio also relied on a network of peer coaches to help people adopt the new way of working. They invested in training the coaches and giving them adequate time to coach. Coaching further empowers the people doing the work.

A Successful Adoption

Clio's approach led to a rapid adoption of KCS with an enthusiasm that continues today. 89% of staff are licensed publishers who, based on their track record of quality work, may publish information directly to customers, without review. Nine out of ten of incoming cases are resolved with a link to a knowledge base article, and the vast majority of those reuse existing articles, driving efficiency and consistency.

Activity hasn't come at the price of quality: article quality spot-checks show authors follow the content standard 94% of the time.

Throughout the adoption process, Clio shared these successes, reinforcing good practices. For example, leaders made a big deal of awarding "diplomas" to newly licensed publishers.

Meaningful Business Results

Was the investment in change management worth it? For Clio, the answer is "absolutely."

By reusing existing knowledge in over 80% of cases, Clio tamed the flood of customer issues. Customers get faster resolutions—31% faster when knowledge is used. The chat launch was a success. Tier 2 escalations are down 36%, while onboarding time has shrunk from six to three-and-a-half weeks. More importantly, the Customer Success organization has time to live up to its name and its ambition of being a trusted advisor.

Self-service has opened a new channel for customers, who according to a recent TSIA report, prefer self-service most of the time. Self-service is now helping over twice as many users as assisted support. By letting customers answer their own questions, Clio has more time to offer value-added Customer Success services.

KCS hasn't just been good for Clio and its customers. Employees prefer having a single source of truth to search, rather than having to scour five separate official sources (plus personal and unofficial sources.) Employee surveys show that employees find useful articles 26% more frequently than before. And, in the near future, Clio will be integrating knowledge directly into its product, further expanding its reach.

With strong leadership and persistent change management, KCS has been a game changer for Clio, its customers, and its staff.

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> **"The Support organization adopted quickly: it was clear how centralized, consistent and easy-to-find knowledge would reduce repeat questions from peers and customers."**
>
> Marcus Stein, Manager of Customer Experience
> Workforce Management and Development