

## Breaking out of the b-loop

### Why b-loop articles don't belong in the b-loop



Adam Krob, PhD  
Senior Advisor, The Verghis Group

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There are a number of critical distinctions in Knowledge Centered Support (KCS) practices. The most important is the distinction between implicit and explicit knowledge. This distinction is the Archimedean lever for all of the benefits of knowledge creation, sharing, and improvement. Taking knowledge out of the heads of our teams and transforming it into findable, usable forms is the key to all of the benefits we gain from KCS.

Another of the distinctions in KCS is between two distinct types of articles. The most familiar (and the core of the KCS practices) are the a-loop articles, which are created while answering a question or helping a customer. The other articles, called b-loop articles, are separate from this process of article creation, building on the work put into creating a-loop articles.

I will argue in the next few pages that this distinction should be reevaluated. Why is it important that we reevaluate the distinction between a- and b-loop articles now?

## Why should I care about b-loop articles?

There are two important reasons to reconsider *evolve* or *b-loop* articles.

### **Companies never get around to b-loop processes.**

Companies spend time and resources to “doing the right things” at the beginning of their KCS journey. Consultants lead workshops to develop content standards, workflows, communications plans, and reward and recognition systems. After this initial effort, most of the organizational mindshare (and share of wallet) is spent on “doing things right”—coaching, feedback, and constant messaging. In theory, there is a constant effort to improve the practices to make sure that the organization is “doing the right things,” that there is good alignment from strategic plan to mouse click. In reality, changes are slow and infrequent. Practices solidify and become “the way we do things.” Managers are concerned about too much change or are afraid to cede their authority.

Since *evolve* or *b-loop* articles are not expressly part of “doing things right,” the time and effort required to create them are rarely invested. KCS works well, but the organization never creates these extremely valuable articles and never truly leverages the knowledge base.

### **The Workflow doesn't make sense outside support**

As I have been actively adapting KCS to other areas of organizations and industries, I have found that **the workflow** described in the *solve* or *a-loop* is not relevant to those outside support. The way that knowledge is generated is different and suggests a different rhythm to knowledge creation, sharing, and improvement. There are different needs that trigger a team member to tap into to broader organizational knowledge, including

- A customer calls/emails/texts/submits a Web ticket/chats/tweets
- A colleague stops by a cubicle to ask a complex question
- A student has an appointment to register for classes
- An employee has a question about company benefits
- A new version of a procedure is released
- A product or service is retired

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- A government regulation changes
- A search engine optimization report reveals searches that had 0 results
- A review of patterns in the knowledge base reveal a software defect

Growing KCS requires that we leverage the practices that we have all see work extremely successfully outside support and beyond high-tech companies. **The workflow** won't appeal or make sense to these other areas. Other workflows are needed to support other need triggers.

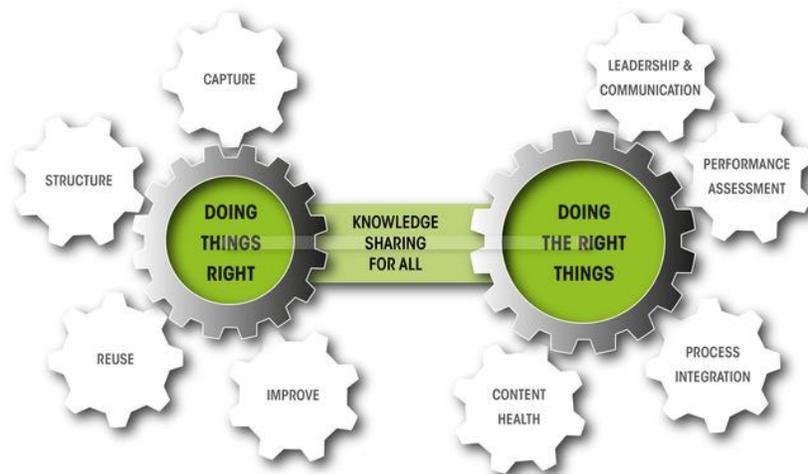
## Defining the B-loop

The KCS practices guide says that

The Evolve Loop is a continuous improvement process that integrates individual-level responsibilities for resolving problems with organizational-level processes, including the responsibility to support and continuously improve the overall KCS system. The Evolve Loop looks systemically at the collection of articles across many Solve Loop events. The organization level processes of the Evolve Loop enable the Solve Loop to be effective.<sup>1</sup>

The crux of the *evolve* loop, as I have always interpreted it, is the organizational support structure to start, sustain, and continue to improve the *a-loop* practices of capture, structure, reuse, and improve organizational knowledge. Put another way, the organizational activities are focused on creating the right environment, incentives, and institutional processes to **enable individuals to make their implicit knowledge explicit**.

To take an analogy from philosophy, the practices of the *solve* or *a-loop* are ethical practices. They are the specific decisions we make when faced with a moral dilemma. The *evolve* or *b-loop* practices are the normative theories that guide us to making the right decision in a particular situation. Phil Verghis' newly suggested diagram would suggest a similar approach to the two loops.<sup>2</sup> The "doing the right things" loop supports and sustains the activities of knowledge creation, sharing, and improvement, which is all about "doing things right".



<sup>1</sup> [http://www.serviceinnovation.org/included/docs/kcs\\_practicesguide.pdf](http://www.serviceinnovation.org/included/docs/kcs_practicesguide.pdf)

<sup>2</sup> <http://www.dancinge.com/2012/11/15/168/>

## Are b-loop articles really part of the b-loop?

The question then becomes this. Do the articles created in “doing the right things” or *evolve* loop belong in that loop?

It depends on what you define b-loop articles as. There are several different types of these articles described in the practices guide (and that I have encountered in different companies), but three bear evaluation:

- Procedural articles built from several existing articles created by support engineers while helping customers
- Articles created from Web search results, not from assisted support customer questions
- Articles pre-created for new product or version launches

In each of these cases, we need to evaluate if the activities/practices

1. Make implicit organizational knowledge explicit OR
2. Support and improve these activities

The first example is relatively simple to classify. Creating procedural articles out of several articles already in the repository is an advanced form of reuse or improvement of existing knowledge. Fundamentally, this practice is bringing to light organization knowledge in its most useful form, not supporting or improving the activity (it can have this effect, but as a secondary, or spill-over, outcome).

The second example is also relatively straight-forward to classify. The activity of mining a search engine for articles (specifically mining it for “customer context” that we can use to create articles) is deferred creation of structured articles. The resulting article is additional knowledge that was previously implicit in the organization, not an improvement to the way that this implicit knowledge is made explicit.

The final example is less clear (and the most interesting). The articles created for a new release or new product version have no relationship to a customer question or request and are not part of the KCS *a-loop* workflow. Would they, then, belong to the *evolve* or *b-loop*?

I would argue that they do not. The practices that result in these articles are the result of a workflow, just not **the workflow** for the *solve* or *a-loop*. One of my clients is starting to roll KCS out beyond the support organization to a “product readiness” group. This “product readiness” group will create and improve structured knowledge before customers have access to new products or versions. As such, the practice that generates these articles are extensions of *solve* or *a-loop* activities **in a different workflow**.

Each of these three types of *evolve* or *b-loop* articles resemble the *solve* or *a-loop* more. They are not activities intended to improve or guide the process of making implicit knowledge explicit. They are part of the process, itself, but a different process from the traditional KCS *solve* or *a-loop*.

## What should we do?

I see two possible ways of addressing these now-orphaned articles.

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**First**, the “doing things right” practices can be amended to add a new practice for “creating articles outside the workflow”

**Second**, the practices for process & integration can be changed to add additional workflows that will result in the application of the “doing things right” practices to these workflows. The best approaches I have seen to b-loop articles define a second workflow, one focused on creating high value articles that the organizations either knows customers need or anticipate what they will need based on sound statistical approaches. This workflow must be carefully created to avoid wasted time and effort. The best way to approach them is to find the need trigger and create coachable practices for search, creation, and improvement.

The second might be preferable, as it requires fewer changes to the overall conceptual framework, but workflow templates must be created and the practices must recommend that these workflows be in place **even before they are used by the organization**. Doing so will require reaching out to other organizations, parts of existing organizations, and areas we have never envisioned using KCS.

But these articles do need a home.