

AGENDA

- **Session 2: KM Techniques**
 - Finding expertise
 - Leveraging experience
 - The Story Telling technique
 - Communities
 - Other techniques ...

Finding Expertise



The ability to quickly locate and leverage the knowledge of all individuals across the organization will deliver significant value to itself and the marketplace

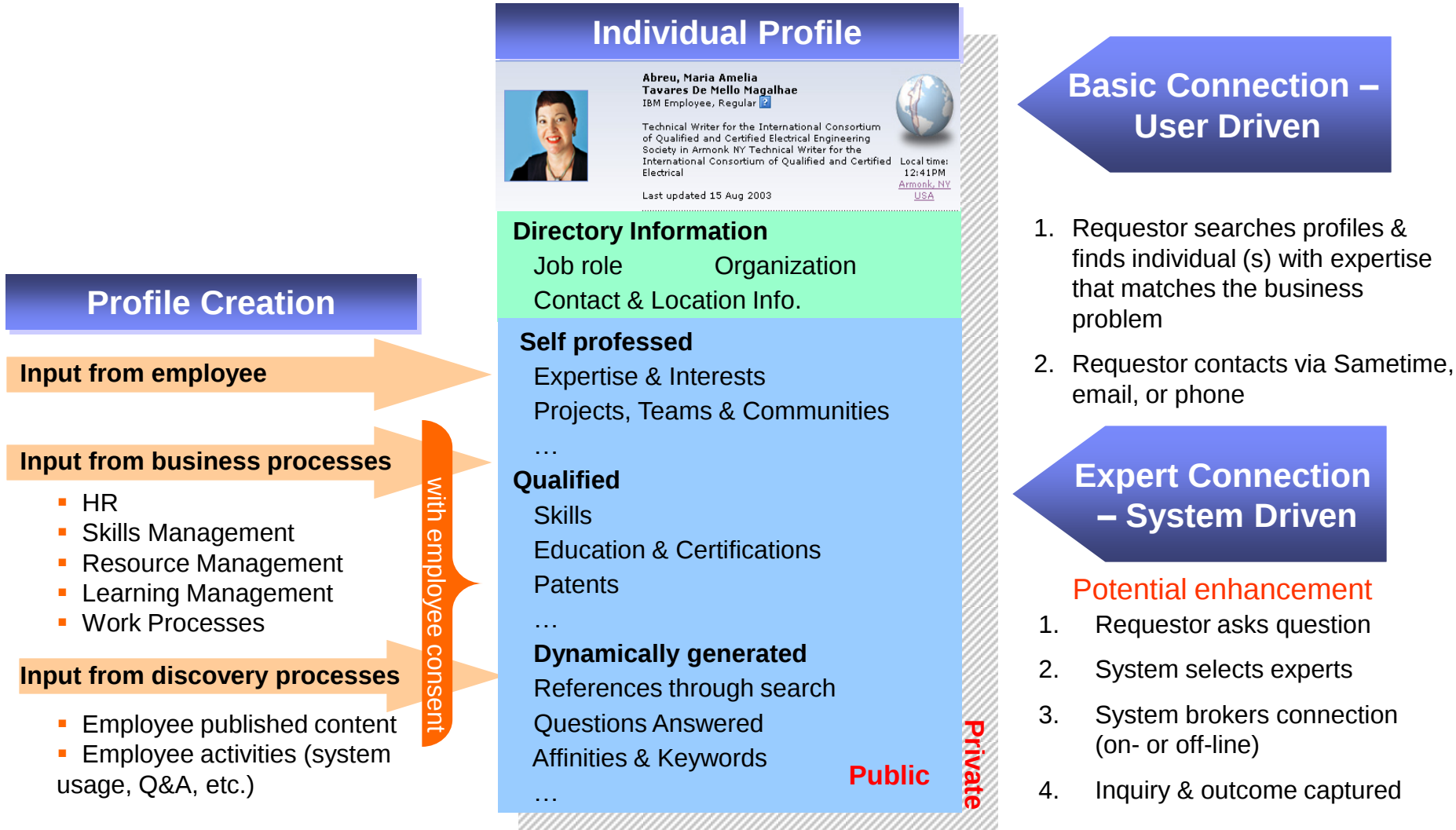
The outcomes...

- ❖ Reduce time spent looking for answers
- ❖ Tap into undocumented and undocumented knowledge
- ❖ Leverage the largest professional workforce in the world
- ❖ Increase the development and sharing of personal knowledge
- ❖ Connect to and leverage the collective expertise within IBM communities
- ❖ Connect to and leverage the expertise of external business partners
- ❖ Rapid identification of knowledge gaps

...that deliver business value



Robust profiles provide the basis for locating the right person. Integrated collaboration capabilities make the process of connecting more efficient



User Profile – Design Highlights

■ “Business Card”

Key contact information
up front

Name pronunciation

Local time/ global map

Reports to chain

■ Collaboration

Preferred contact method

Sametime awareness

Add person to Notes
address book

Add user to Sametime list

Send an email

Send an instant message

Marsh, Renee L. [Pronunciation](#)
CHQ/Technology & Manufacturing
Director, Transformation Enablement, Enterprise BTE
Assistant: [Cuzzocrea, Regina K.](#)

[Somers, NY United States](#)
Building: SOM3 | Floor: 2 | Office: 2331

Local time: 04:08 | 4:08AM

My preferred contact method is e-mail

Phone: 1-914-766-3885 (T/L: 826-3885)
E-mail: rmarsh@us.ibm.com
Notes mail: Renee Marsh/Tarrytown/IBM@IBMUS
Sametime status: • Marsh, Renee L. | [Sign out](#)

Add to: [Notes address book](#) [Sametime list](#) [My BluePages list](#)

Report to chain

...
[Truskowski, Brian](#)
[Sormilic, Carol A.](#)
Marsh, Renee L.

Other reporting views

- [Full report to chain](#)
- [Same manager](#)
- [People managed](#)
- [Departments managed](#)

Jobs & contact info | Experience & qualifications | Projects & teams | Communities & interests | Reporting structure | **Summary**

I am the Director for Transformation Enablement, a part of the Enterprise BTE organization within the CIO's office. I have responsibility for providing solution delivery for cross-enterprise projects. This includes On Demand Workplace initiatives, CIO and Corporate Staff projects. This includes the Expertise Location and Communities initiative, DRMS, EWI and others. In addition, I lead an Enterprise Transformation Services team providing SME support to the delivery teams. This includes advocacy for Accessibility (CI 162) and User Experience internally. I also have responsibility for IBM's internal knowledge management (KM) program with responsibility for setting the corporate KM strategy, providing KM leadership across the IBM business units, and deploying enterprise wide KM infrastructure and solutions to IBM employees worldwide.

[Biography/resume/CV](#)
[Download biography/resume/CV](#) (10k, Word Pro, uploaded 21 Jan 2004)

User Profile – Content Highlights

Job Information

Job role, Business Unit,
Customers supported,
Languages spoken

General Experience

Business, Industry,
Customer, Competitor

Technical Experience

Technology, Solution &
Products, Platform

Skills

Projects & Teams

Communities & Professional Organizations

Resume / CV

Certifications

Internal & External

Credentials

Education, Books & Papers,
Patents



Marsh, Renee L. [Pronunciation](#)
CHQ/Technology & Manufacturing
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Assistant: [Cuzzocrea, Regina K.](#)

[Somers, NY United States](#)
Building: SOM3 | Floor: 2 | Office: 2J31

Local time:
04:15 | 4:15AM

My preferred contact method is e-mail

Phone: 1-914-766-3885 (T/L: 826-3885)
E-mail: rlmarsh@us.ibm.com
Notes mail: Renee Marsh/Tarrytown/IBM@IBMUS
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Jobs & contact info | Experience & qualifications | **Projects & teams** | Communities & interests | Reporting structure | Summary

Projects

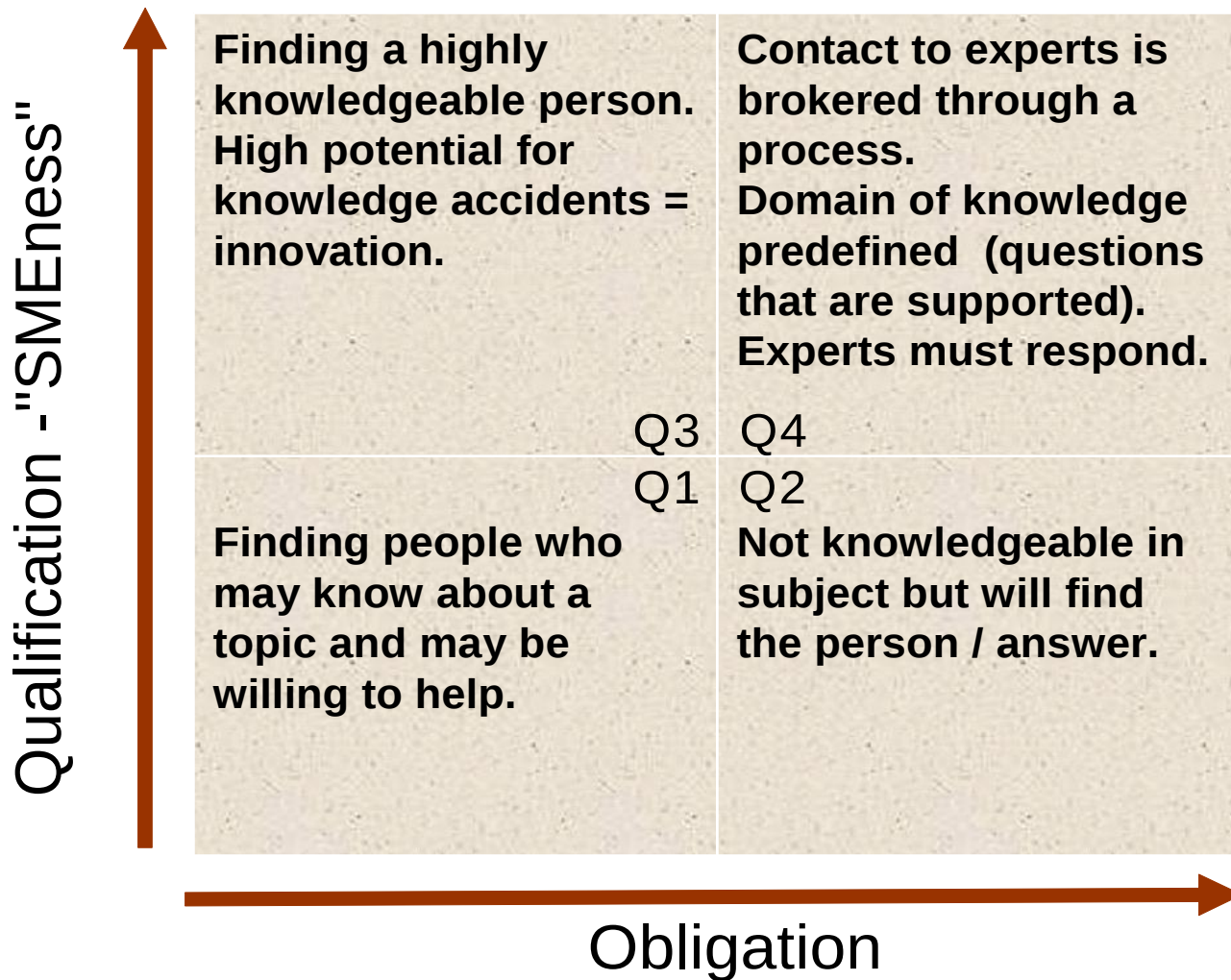
I have worked on initiatives primarily related to knowledge management such as expertise location, intellectual capital management, On Demand Workplace and innovation. My focus has been business transformation with technology as a key enabler.

Project name	Project description
BluePages Plus	The integration of Bluepages and Persona in addition to collaboration functions. The first phase of our expertise location strategy. The lead on my team for this is Robert Hopewell.
CommunityMap	Provide a single place for communities across IBM to identify themselves and also manage their membership. The lead on my team for this is Matthew Simpson.

Links: [Persona](#) | [Collaboration Central](#) | [Community Map](#)

Documents: No information provided

Expertise location takes many forms



Expertise Location (summary)

- **The objective of the Expertise Location initiative is to enable employees to tap into the expertise of individuals across the company:**
 - **Company wide Database**
 - **Experts database with FAQ and brokerage**

Lessons Learned Method



Lessons Learned = capture/use of experiences to improve quality, productivity & time

When ?

Capture post-mortem
and during projects

Timely retrieval
and capture

How?

Structure – to gain
efficiency in
capture/use

Integrate with Project
Mgt, and sub-
processes

Part of basic way
work is done

Systematic capture
with intended use

What ?

Routine and non-
routine work

Use for next
activity or
iteration

Done well and
“not well”

Specific areas of
focus for
learning and
improvement

Benefit one team or
many

Climate ?

Penalty free, open
dialogue

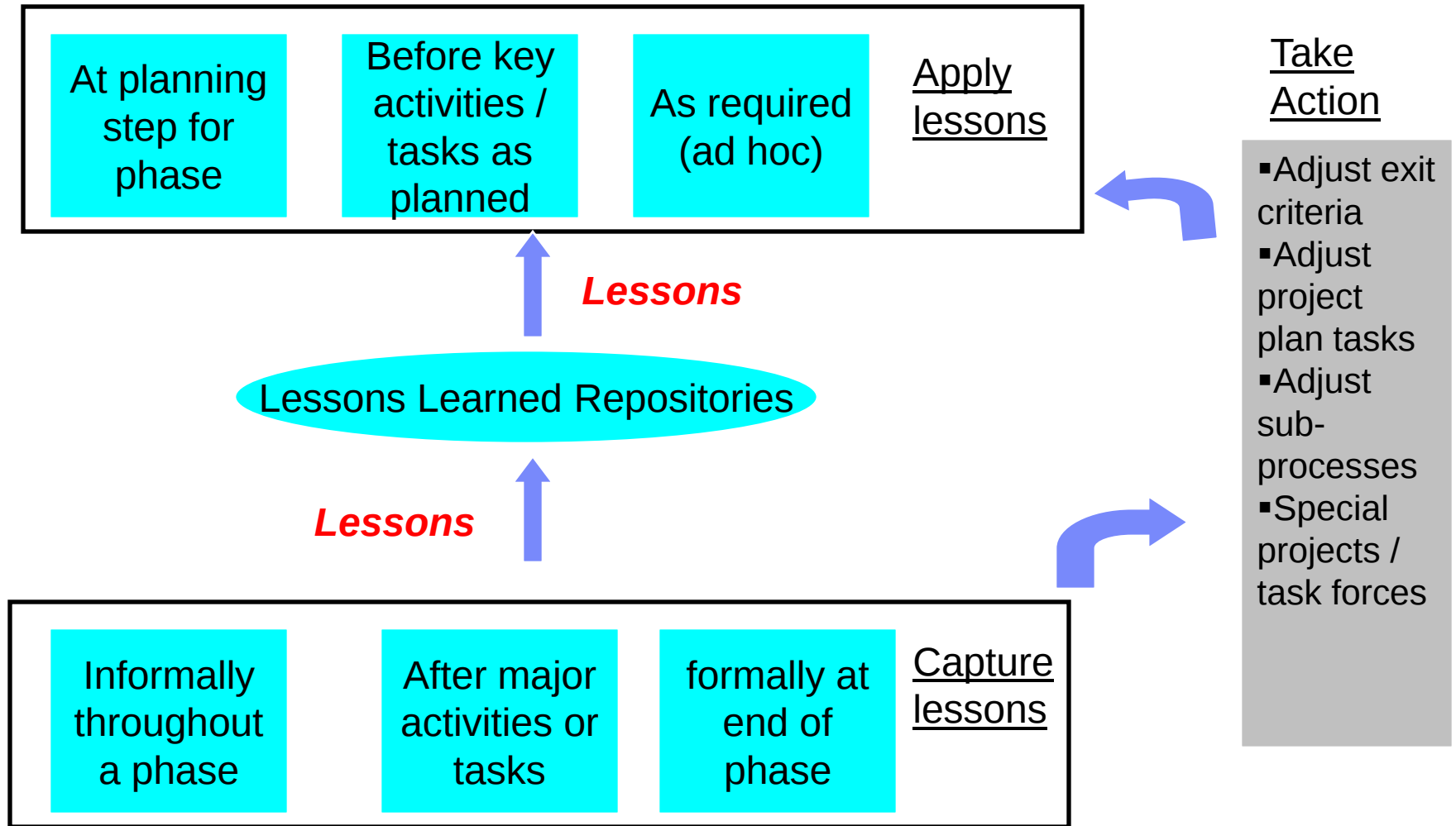
Both informal and
formal

Willing to challenge
and ask why

Individual review and
collaborative

With mandatory
participation

The Lessons Learned process includes capture, sharing and use of collective knowledge to improve results



Lessons Learned: three steps

1. What was our objective and actual results?

- Identify the outcome(s) which the team attempted to achieve; prioritize them 1, 2,3, ...
- Rate performance: far exceeded, met, missed, greatly missed
- Then select one objective for the next 2 steps

2. What was done well/not well, and how to sustain or improve?

- As a group, identify the key successes and failures, noting the underlying driver
- Continue asking 'why', until a specific cause is uncovered, which can be either supported / continued or removed

3. Identify the specific Lesson Learned and recommended actions

- Define the key information which should be used in the future to increase the chances of success or reduce failures. Note who (role) should use the lesson and in what situation
- Note actions resulting from the Lesson, which should be taken to support desired results

Video by Nick Milton (KNOCO)

- ['Lessons learned](#)
[\(web\)](#)

Articles

- [Best Practices discussion in linkedin](#)
- [Successfully Implementing Best Practices & Lessons Learned \(APQC\)](#)

Lessons Learned: three steps

1. What was our objective and actual results?
2. What was done well/not well, and how to sustain or improve?
3. Identify the specific Lesson Learned and recommended actions

Team LL database

Team LL database
Team LL database
Team LL database



Common LL database

Story Telling:

KM Story Telling Method

(web)



Videos on Story Telling

- [Telling a story](#) [\(web\)](#)
- [Choosing a story](#) [\(web\)](#)
- [Timing a story](#) [\(web\)](#)
- [Ending a story](#) [\(web\)](#)
- [Entertaining](#) [\(web\)](#)
- [Writing vs Telling](#) [\(web\)](#)
- [Did you tell a good story?](#) [\(web\)](#)
- [Practice](#) [\(web\)](#)
- [Digital Story Telling](#) [\(web\)](#)

Why storytelling?

- **Storytelling works.** The simple reason why storytelling is becoming a major factor in management and organizations is that it works. Purposeful storytelling can get results in the modern organization that traditional abstract modes of communications can't.
- **An old technology** with a modern use. It draws on aspects of human nature of which we are barely aware and makes use of a delivery system that is as old as civilization itself – the spare evocative story – storytelling recovers a technique for inviting people into the process of change.
- **A powerful technology:** Purposeful storytelling can reach large numbers of people, amazingly rapidly. People get the idea, not slowly and painfully by the accumulation of evidence and meticulous elaboration of multiple dimensions.
With storytelling, people can get the idea in a flash.
- **Getting results now:** Purposeful storytelling is a tool for getting thing done in the world, getting business results. Storytelling delivers. Because it delivers so quickly, it is in tune with the web-speed economy.

Why storytelling?

- **The technology is free:** Storytelling doesn't require expensive investments in hardware or software. It doesn't involve recruiting expensive experts. Storytelling is the ultimate low-cost high-return technology.
- **Everyone already a storyteller:** We start learning to tell stories and listen to stories at the age of two, and spend the rest of our lives telling stories. Storytelling is so pervasive that we are as unconscious of it as we are of the air we breathe. It is something we know already how to do.
- **Everyone can be a better storyteller:** Though we all tell stories all the time, we are often unaware of it. Once we realize what are doing, we can all learn not only to become better storytellers but also to use storytelling to business results.
- **Everyone can get results from storytelling:** The understanding of storytelling and the development of technique enables one to use get organization and management results from storytelling. It's the purposeful telling of stories, not accidental narrative.
- **We need to unlearn what we have been (mis)-taught.** We start out life as storytellers, and then we are taught at school to unlearn this technology, to use abstract language. We are taught that knowledge is abstract and storytelling is for children. In our private lives, we ignore the advice. But the same technology can also be used at work. We need to realize that stories not only function socially but can be used for serious purposes to get results fast.

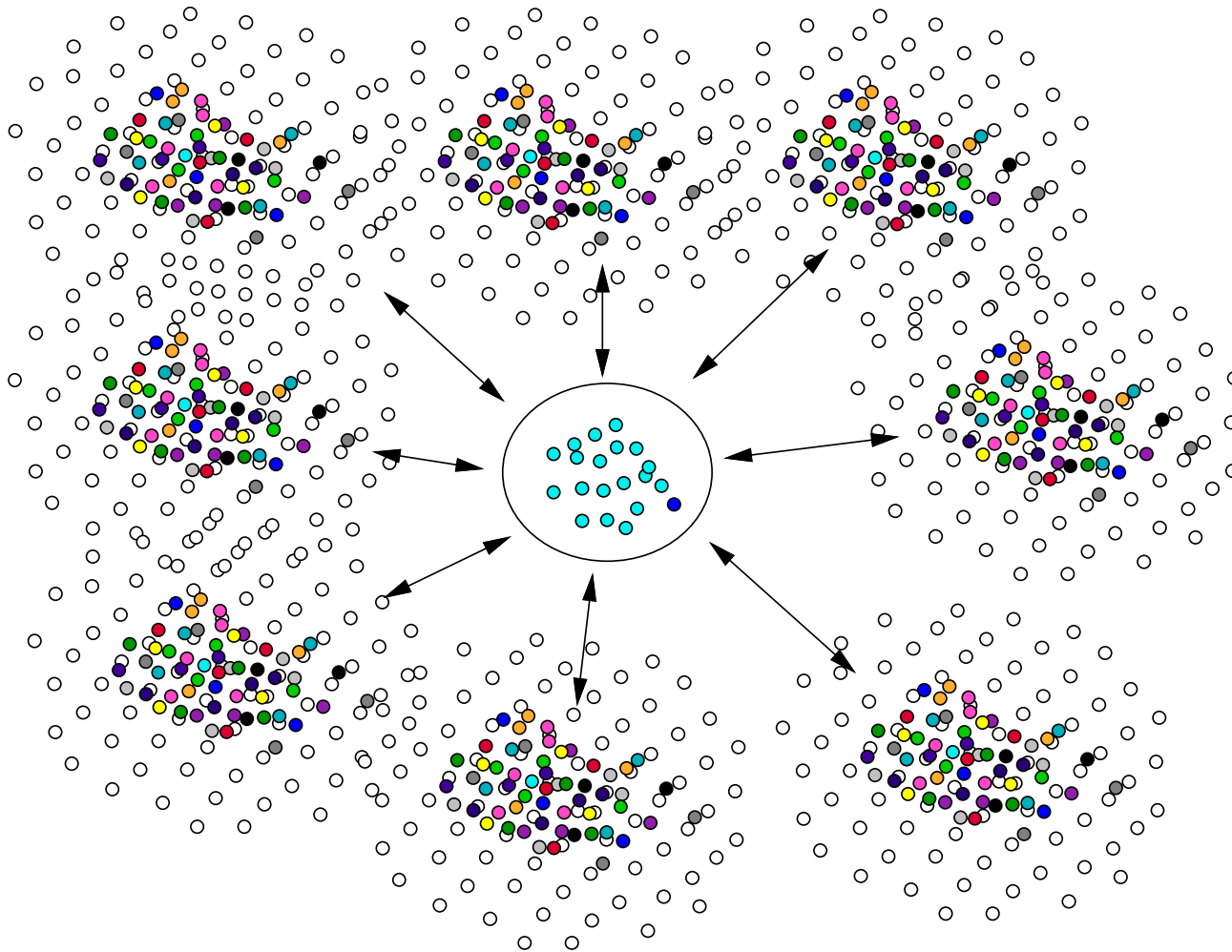
Communities

Communities

- ❖ **Groups of people who come together to share and learn from one another face-to-face and virtually**
- ❖ **Community members deepen their knowledge by interacting on an ongoing basis**

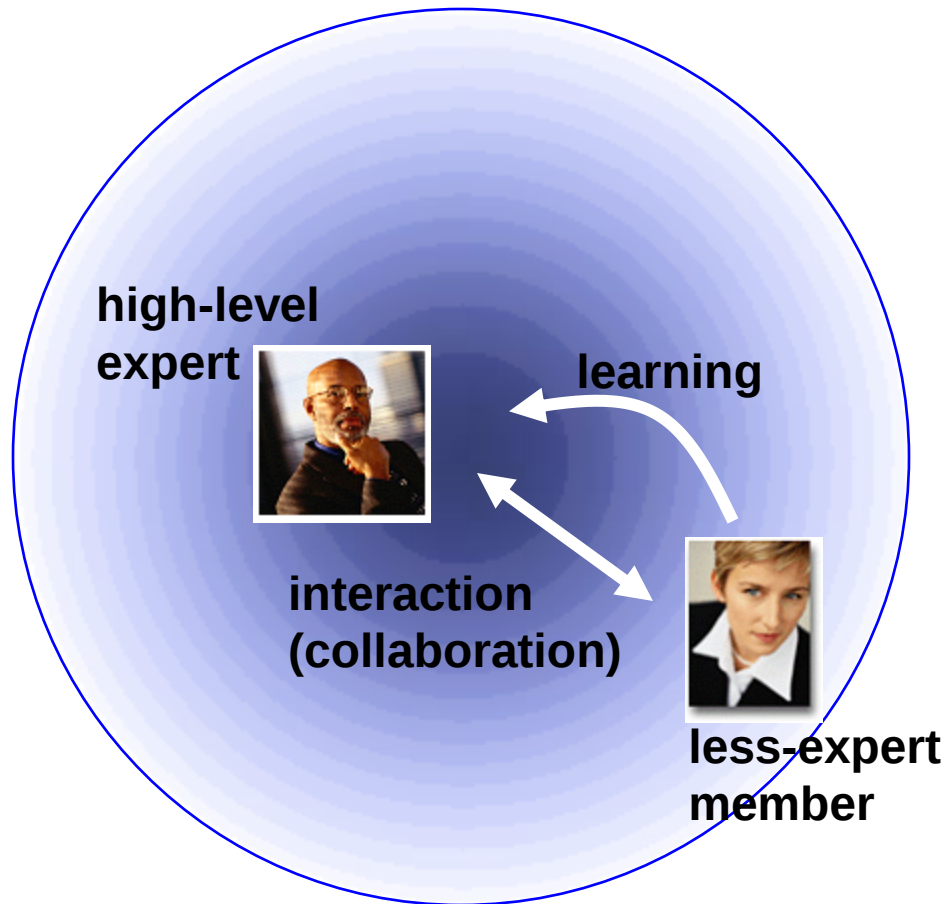
"A candle loses nothing by lighting another candle"

A Community is a group of people...



- **Something in common**
- **Voluntarily gather together**
- **Interact with one another**
- **Recognize each other as members of the group**
- **...based on the commonality.**

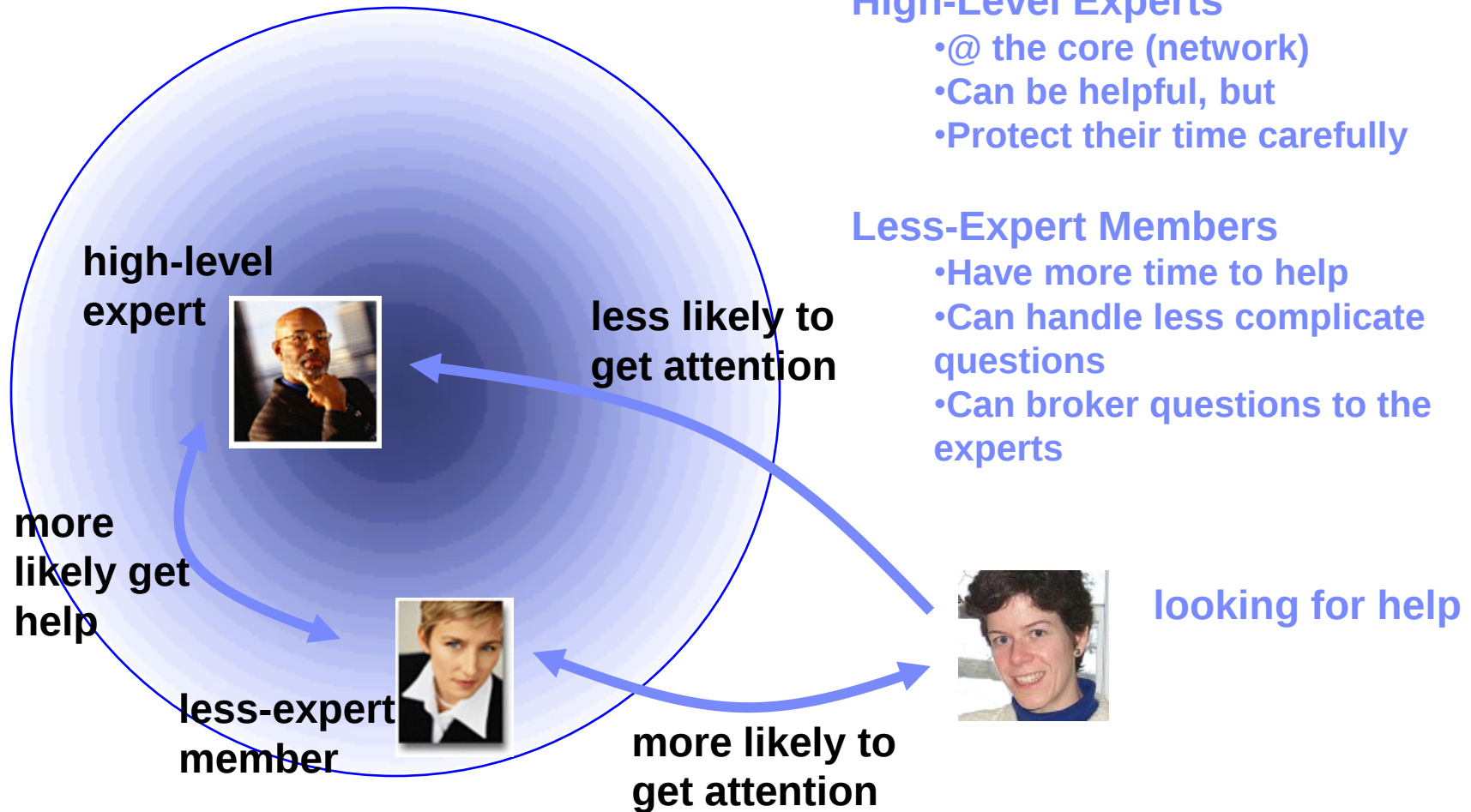
Communities are a Way to Grow Expertise



Source of Expertise that can Handle Situational Demands

- High-Level Experts
 - Willing to give time to people within their community
- Less-Expert Members
 - Want to access and learn from high-level experts

Communities are Sources of Expertise that can Handle Situational Demands



Communities deliver business impact

% Active community members reporting that communities have an impact on these capabilities



Primary impact

- Skill acquisition (86%)
- Produce higher quality work (75%)
- Efficiency of effort (72 %)
- Use intellectual assets (72%)
- Operate efficiently (72%)
- Time and cost savings (65%)
- Reduce costs (65%)

Secondary impact

- Achieve Innovation (58%)
- Better use GS Method (57%)
- Close sales (55%)
- Faster Speed to Market (53%)
- Better Customer Sat (53%)
- Obtain utilization (46%)
- Observe Reduction in Turnover (39%)

Social network vs Community of practice

[‘Nick Milton’s view
\(web\)’](#)

[‘The full discussion on CoP’](#)

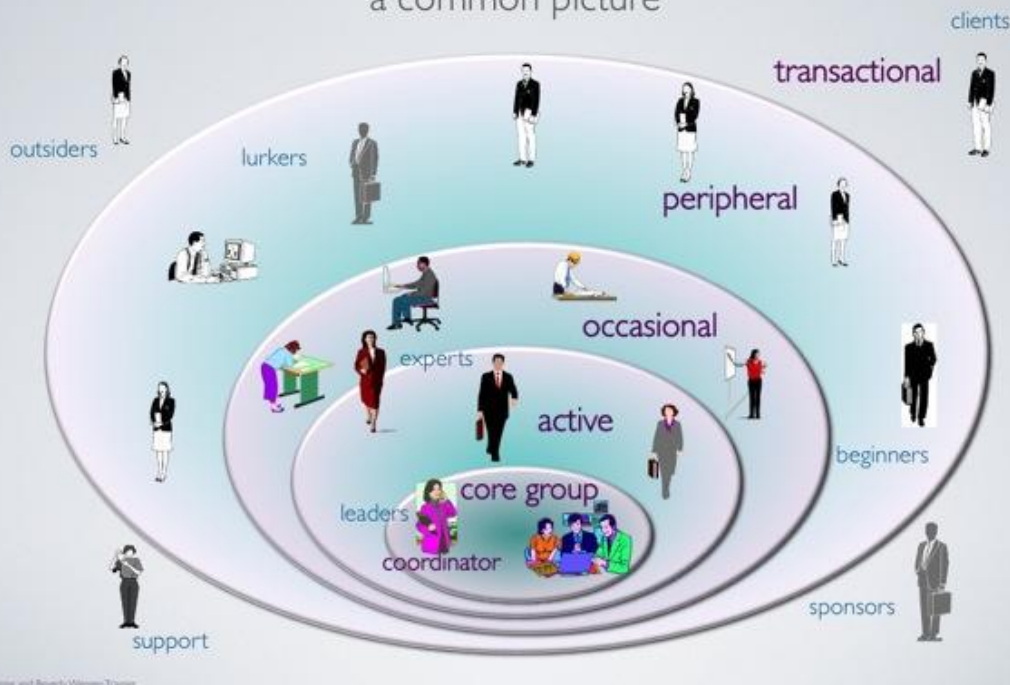
Communities of Practice - definition (by Etienne Wenger)

A community of practice is a group of people who share a concern or a passion for something they do, and learn how to do it better as they interact regularly.

Communities of Practice

Levels of participation

a common picture



Core group: a relatively small group of people whose passion and engagement energize and nurture the community

Active participants: members who are recognized as practitioners and define the community (though they may not be of one mind as to what the community is about)

Occasional participants: members who only participate when the topic is of special interest, when they have some specific to contribute, or when they are involved in a project related to the domain of the community

Peripheral participants: people who have a sustained connection to the community, but with less engagement and authority, either because they are still newcomers or because they do not have as much personal commitment to the practice. These people may be active elsewhere and carry the learning to these places. They may experience the community as a network

Transactional participants: outsiders who interact with the community occasionally without being members themselves, to receive or provide a service or to gain access to artifacts produced by the community, such as its publications, its website, or its tools

Video (Communities & Story): JF Chenier (web)

Videos

- 'What is a Community of Practice – Discussion

(web)

- 'Communities, example: Caterpillar

(web)

- Introduction to communities (Altstom University)

(web)

Summary

- Stories are the DNA of Knowledge Management
- Communities are the organizational form through which Stories facilitate knowledge socialization
- Lessons Learned programs are excellent “quick win” targets for piloting the use of a Story Method

[A summary presentation at the American Institute of Aeronautics and Astronautics \(web\)](#)