Leveraging Knowledge – Finding Experts
October 19, 2006

The challenge…

Instant access
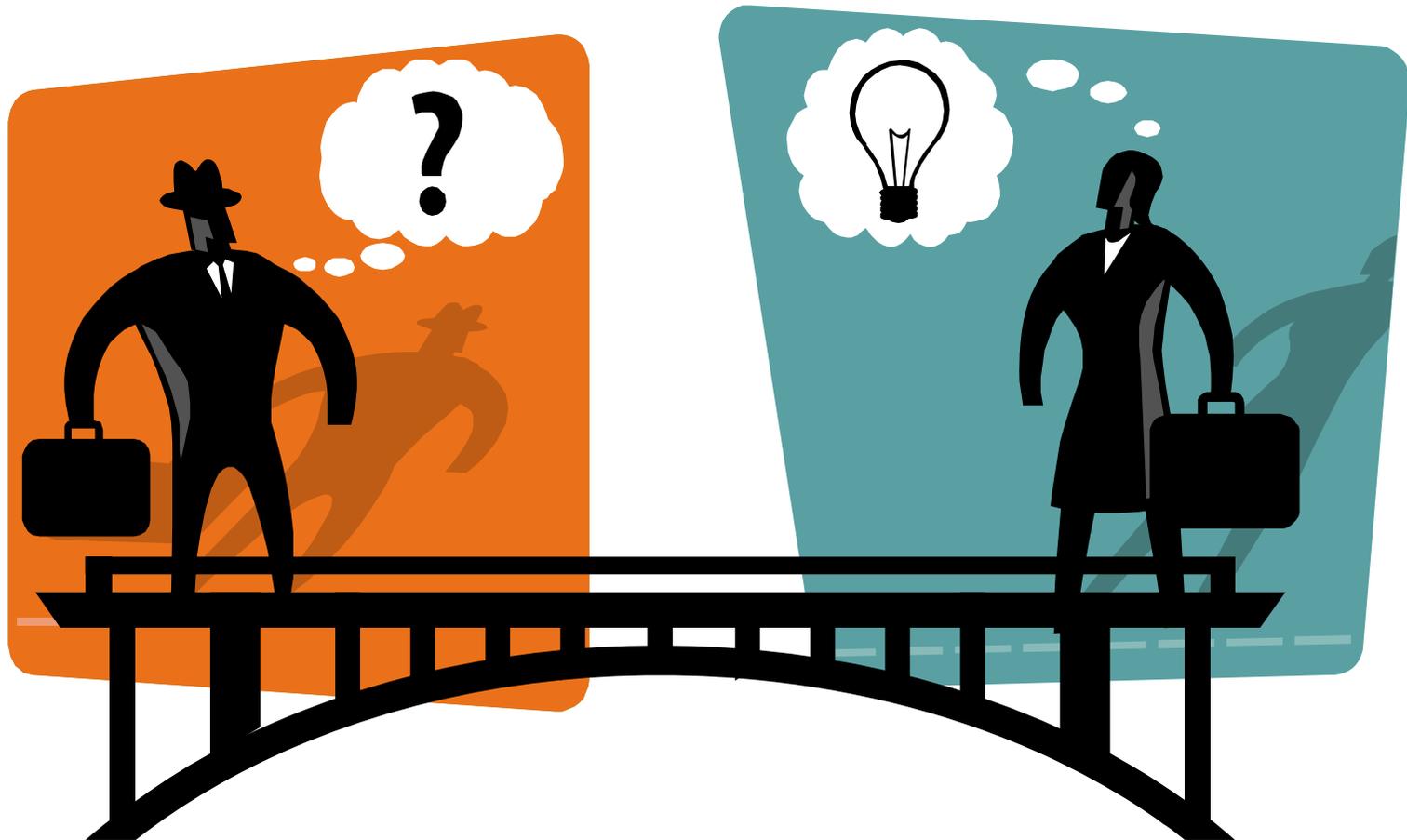**Sharing a way of life**

Geographically dispersed
Roles specialized
Silos develop
Sharing blocked

Sharing impacts
- •Performance
- •Quality
- •Productivity
- •Innovation
- •Staff development

What is "Expert Location?"

Expertise location and management initiatives cover a broad spectrum.

## Increasing functionality and sophistication

Human Intermedi-aries	Staff Directory	Staff Yellow Pages	Specialized Expert Location Applications	Specialized Expert Location *and Expertise Management* Applications
• As the name implies, one ore more people who know (or can discover) who knows about what – and can thus direct people with questions to people who can answer them	• Equivalent to a white-pages phone book • Medium can be paper or digital • Can be simple as a shared Outlook address book	• As the name implies, an indexed directory of staff • Index can be simply department, or can include areas of knowledge; e.g., industry, product, process, and/or customer expertise • Medium can be paper, but most often searchable digital • Categorization can be done by em-ployee, supervisor, and/or HR	• To the user, much like staff yellow pages • Behind the covers, more sophisti-cated applications, with automatic identification of experts, continual updating of their status, and moni-toring of the system's performance • In addition to manual identification, experts identified by electronic "crawlers" that scan selected enterprise data stores, linking individuals with the questions they ask, the answers they give, and the things they write • Crawlers can be pointed at repositories, email, blogs…any electronic file	• Incorporate the features of expert location applications • Maintain links to selected, crawled, repositories, and can thus direct a questioner to both content and human experts • Capture question/answer history and maintain a database of past questions and answers, and can thus first give a questioner prior relevant answers before sending questions to human experts for a reply

"Manual" expert locators

Automated expert Locators

Answer ← ← **Willing and Able?**

Q&A Database

Expert Database

Can't Help Can't Help Can't Help
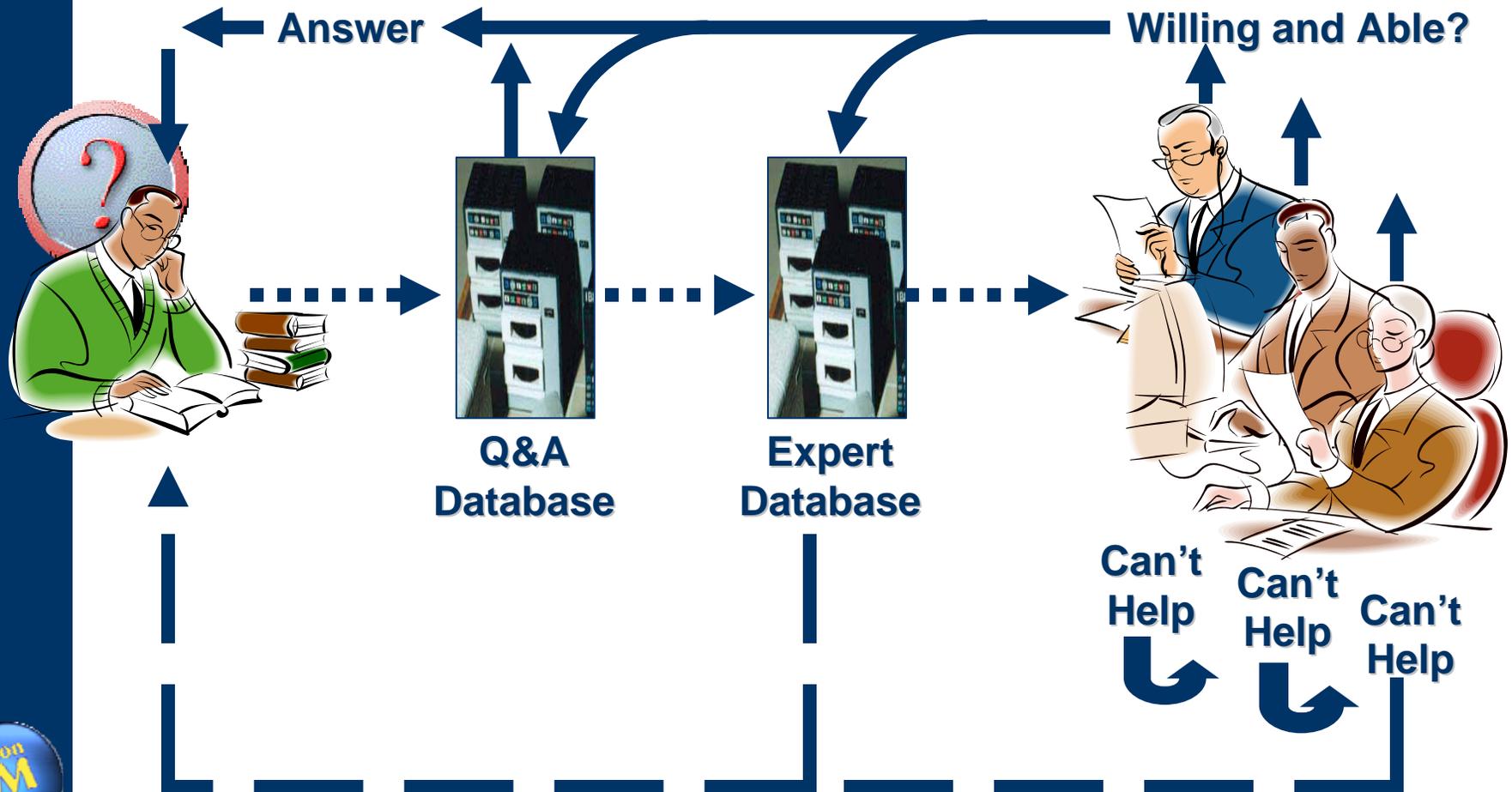
Here is a high-level analysis of two popular expertise management tools.

- Tacit's ActiveNet

- AskMe

www.tacit.com

**Coming soon:
www.illumio.com**

Tacit's ActiveNet – How It Works

- Taps into enterprise systems, spidering and mining e-mail, discussion databases, file servers, web servers, content management systems, and collaboration systems
- Continuously discovers and updates each person's work focus, activity, and business relationships
- Creates individual profiles that ActiveNet can search to find experts to respond to requests for expertise
- Ensures each individual's privacy – employees can decide whether and how to publish their profiles and whether or not to respond to requests; even administrators have *no* access to employees' identities
- Moderates requests and responses, respecting the privacy of both parties

Tacit's ActiveNet – What It Does

- Lets users send requests to targeted, anonymous groups that match search criteria

- Mediates connections between users and experts

- Provides automated notification of new activity in areas of interest and expertise

- Automatically discovers and extends existing external business relationships

AskMe – How It Works

- Automatically creates employee expertise profiles based on documents they have authored (including e-mails, discussions, Office documents, etc.)

- Automatically identifies key learnings in its knowledgebase

- Builds a searchable, easily managed knowledgebase of publications and Q&A interactions

- Through its search, returns most relevant people, discussions, and documents

- Supplies tools to create an foster communities of practice

AskMe – What It Does

- Connects people who are blocked on critical tasks with others who have needed expertise

- Finds the right expertise despite organizational and geographical barriers

- Captures all resulting solutions in a searchable knowledgebase, thus avoiding re-inventing the wheel

- Provides one point of access to the documents, people, and solutions people need to do their jobs better

Many systems can help leverage expertise.

- AskMe
- Tacit's ActiveNet
- OutStart's Participate
- Siderean
- Autonomy
- Microsoft Outlook
- Act!
- LinkedIn, et al
- Guru
- 100+ others!

These systems have features that directly support managing corporate expertise.

- Mediate access to people with knowledge
  - Identify, classify, categorize, and validate experts
  - Find right expert to respond to a request
  - Protect experts from being overburdened
- Support interactions with experts
  - Facilitate communication with and among experts
  - Stimulate joint creation and sharing of artifacts
  - Help form expert teams
- Make relevant information retrievable
  - Identify, categorize, and index expertise
  - Respond to queries with the right material
  - Determine how to answer questions based on requester
  - Log and save responses to avoid re-researching questions

Pipek, Volkmar and Wulf, Volker, "Pruning the Answer Garden: Knowledge Sharing in Maintenance Engineering;" D'Agostino, Debra, "Expertise Management: Who Knows about This?," CIO Insght, 7/1/2004; and Mabury, Mark T., "Knowledge Management at The MITRE Corporation," in Rao, M. (ed.), "Leading with Knowledge: Knowledge Management Practices In Global Infotech Companies," Tata McGraw Hill, 2003.

Expertise Management Systems have clear benefits.

- Free talented people from re-answering old questions

- Help avoid reinventing the wheel

- Provide answers fast, increasing productivity

- Keep expert directories updated dynamically

- Identify knowledge gaps for remediation

- Facilitate assembly of strong teams

- Enhance innovation success

D'Agostino, Debra, "Expertise Management: Who Knows about This?," CIO Insght, 7/1/2004