## *Key Learning from Finding Experts, Boston KM Forum, Oct. 19th, 2006*

### Ice-breaker SNA exercise

Attendees received a short taxonomy of KM-related terminology from which they had to select five topics in which they have some expertise. They were then given stick-on tags with a top and bottom section. In the top section they were to place two topics in which they would like to be sought out by others as experts. In the bottom section they were to put two topics about which they were seeking expertise (it could be something about which they already had expertise but wanted more).

The audience then had to circulate and mark down how many people in the room had expertise in one of the area that they needed and make a note of how many people existed in each category. After circulating, we assembled and contributed the topics for which there was no expertise that we could find. This illustrated how a domain might discover gaps in knowledge and the need to find outside experts or new hires. It also showed how the person with the knowledge one needs can be in the same room (or company, or community) and that fact is simply unknown. We also used some of the topics with scant expertise in a LinkedIn exercise later in the day to see how we would use tools to reach out.

### Cesar Brea, the Monitor Group

Cesar was involved in developing a KM system used by Siemens when he was building custom applications using open source software. Part of their success came from looking at email log files and from that learning how to network using email tools. They created an extranet, kind of a corporate "MySpace" to see who was tagging what and how.

His experiences over 20 years have taught him three principal important areas to focus on:

1. Value – diminishes significantly in any communication (email, Web page, or self-introduction) after the first point in made. All people are really looking for when seeking expertise is someone who knows a little more than they do and connections to a tribe of related "experts."
2. Privacy – has an interesting influence on how people will react to requests for information. The less information you request, the more you'll get. (e.g. If you ask people to fill in an online form, begin with a simple request such as just email address) then follow up incrementally with further requests as the communication evolves.) By getting information a little at a time the net is likely to be a lot more than trying to get it all at once.
3. Simplicity – Keep the contribution form simple and the result (consumption) reporting very simple and easy to absorb. People will digest it and consume it more effectively.

[LWM NOTE: I commented on the value of understanding the privacy issue when asking for help, information, input, etc. in a personal interviewing process. When I have solicited commentary on a subject, I find that making an appointment for a very short amount of time to ask a couple of question usually nets huge actionable and valuable results. If the right question is asked it usually opens the "flood gates" and the interview session takes on a life of its own with the person contributing information that I might never have thought to ask. Starting with a long drawn out survey or list is almost a cue to the person to keep responses to a minimum because they want to get to the end of list quickly. Brea's comments reinforced this intuition I had previously gathered.]

## Bob Wolf, Recently Retired from Boston Consulting Group

Bob is writing his next article for Harvard University Press and some of the work he reported here will appear there. His work as illustrated in the PowerPoint is focused on *who is expert in what* and *who knows whom*. Once you know that, you want to begin programs to team people who are well connected to others with people who are well connected and schedule to learn in a year or two. See Slide 2 in which you need to facilitate the creation of connectors into and out of Org. B, for example.

## Misiek Piskorski

Misiek built on what the previous two panelists had to say, focusing on why people would want to join any community. He likened it to dating or deciding if you want to have a social relationship with someone; for it to succeed there needs to be some reciprocity. Among the enticements is the desire for people to show off their achievements to others in the community because it may accrue some benefit to them personally. What makes people join is what you have to offer them. You can't force people to do so, but beginning by offering tools will tend to get the most talented people to join. This may create attention and be a draw to others who will want to be part of the network.

## Larry Prusak

Larry speaks extemporaneously without notes or slides. He has been a KM consultant for almost 20 years, spending time at IBM, at one of the big eight consulting firms, and at Temple/Barker/Sloane. He found all these organizations operated counter to his beliefs about leveraging knowledge and building cultures of sharing.

Here are his key points:

- The only explicit knowledge is facts and rules. Everything else is tacit.
- On a recent shuttle roundtrip planned to New York, which he does over a hundred times a year, the flight was scrubbed and all the "commuters" were grounded. He decided to do a survey, introducing himself to everyone in the lounge, a couple hundred people, many of whom he sees all the time but never speaks to. His question: why are you going to New York? 60% were going to a meeting in their own company and the rest were sales people, tourists, students, visiting a client, etc. He observed that here were a majority of the people for the flight spending upwards of $1,000 roundtrip in time, expense and inconvenience to meet in person with people in their own organization. In his follow up questioning of that 60%, he learned almost none of them had been commanded by a superior to be there.

His conclusion is that the non-*documentable* part of any interaction is BEING THERE. Digitalization will never be a substitute for socialization. Even with all the e-conferencing, Web conferencing, teleconferencing tools, key people with critical knowledge and in the top positions will always have to be there.

- E-learning and e-sharing environments are "b___s___." Example: a friend of his is the CIO at Chase Manhattan. He was chatting with him about his kids and asked him where his daughter decided to go to college; he said Williams. Then he launched into all the online interactions she was having with the school to select housing, courses, etc. Larry asked him why she wasn't just taking the courses online – it would save a lot of money. His friend thought he was crazy to suggest that – she had to go; she had to have the human connections, interactions with other students and faculty, etc. But, Larry argued, you train 90% of your workforce here at Chase Manhattan with CD-ROMs that are supposed to teach them everything from how their benefits plan works to how to use technology in the organization. However, the top managers are sent all over the country or world to attend conferences to learn things and exchange ideas with other executives. We are creating a two-tier system in which we know that "being there" is when real knowledge is gained and exchanged – but we are telling most of our employees that we don't value them enough to send them in person to really learn and gain those valuable experiences. Power is everything and protected by a privileged few who get to experience their business connections personally; personalization is the most powerful thing we can do to empower people in their jobs, but we don't do it for many.
- He has learned that the differential in the amount of knowledge between the privileged and the rest of the workers is really very little. Power has little to do with the actual amount of knowledge people have, just how they acquire it and the human connections they make when acquiring it. The knowledge they have is more focused on how to get and retain power. The knowledge of the average worker has more to do with executing tasks, operating on facts and with rules.
- Time is really a form of wealth and when you give people time you are creating a relationship of reciprocity and trust because you are sharing your wealth.
- There are three types of organizations in which sharing and collaboration really work: Mission critical organizations (think NASA or military units), small organizations where everyone has face-time with everyone else and collegiality is built, and situations in which enforceable social norms are created (e.g. in which responsiveness is valued and rewarded).
- If you have organizations in which people never respond to others or get back to them when a request is made, and if this is tolerated, it becomes antithetical to trust, cohesiveness and collaboration. Solo acts don't send a good message. Stars who never share or collaborate contribute nothing of lasting value to an organization.
- Larry has worked on gathering information the cost of knowledge. Places like ETS, Batelle, Pentagon, and Novartis studied costs of knowledge transactions and categorized the types of those transactions. By far the largest category was

the process of interpreting, synthesizing and adapting what you learn from the information you receive and gather.

- Companies really miss a huge opportunity to build value in their employees by not giving more training and orientation when they join the organization. Leaving people to have to spend years in a "discovery" mode is very bad business and many people leave organizations when companies won't invest in their learning experiences and contribute to those.
- Clumps of knowledge workers who are deeply wired matter most, not individuals. You don't want stars in organizations; you want a lot of people who work well together in groups and people who are well connected to a lot of other people inside and outside the organization. That's where you get the most value.

## Phil Knutel

Phil, Director of Academic Technology, Library and Research Services at Bentley, was asked to describe what Bentley is doing to facilitate locating experts in the institution by those on the outside and from within. A public portal interface supports searching for faculty experts but limits access to information about current research to only those within the college. It took many months of committee meetings to come to agreement on what would be included and how faculty would update their professional work. An Oracle database is at the back-end with an update form that needs improvement. Its awkwardness caused some faculty to balk at doing the updates themselves and temporary workers were needed to make sure they had CVs for all faculty. On an on-going basis, some are better than others at contributing updates but they are working on ways to make it easier.

Key objectives:

- Ensure that faculty would have up-to-date publishable CV on-line that they could count on to be a current CV.
- Provide a place for new faculty to find others in their field or areas of interest quickly to help them become members of the community more rapidly.
- Improve communications across the campus.
- Provide a source for information for the media when the institution is being written about, such as faculty facts and publications.
- Create a simple mechanism to encourage faculty to update and professionalize their experiences by providing a common format.
- Normalize data for annual reports on the institution

They have achieved most of the objectives with the exception of the last item and they need to do more work on making it easier for faculty to update their information. The result has been a surge in accessibility resulting in faculty receiving many more inquiries about their work, internally and from outside.

Phil also devoted a few minutes to bring the audience up-to-date on their state-of-the-art library, which has just undergone a multi-million dollar renovation. Among its greatest successes are the 24 group study rooms, 19 with large flat screens for tele-video conferencing. The rooms are booked electronically; an electronic monitor in the library (and on the college's intranet) lets students know immediately the availability of space or if a room has been freed up. The amount of sharing and collaboration that has resulted from this environment is huge. The audience was invited for a tour.

Knutel also described the great success of RFID labeling the entire collection and installing a security and check-out system that lets people check out an entire stack of up to 8 items with a single pass. Moreover, the system supports electronic inventories in a highly efficient manner.

### Rock Griffin

A consultant, described how he leverages LinkedIn in his work consulting in Sales Force Consulting. See PowerPoint.

### Larry Chait

Two expertise locating products: ActiveNet from Tacit and AskMe were described. See Powerpoint.