In spite of the imminent Labor Day week-end we had twelve in attendance to weigh in on the timely topic of *Finding and Tracking Expertise*.

Notable comments:
- A particular tool for tracking experts comes from Trivium of France in partnership with Arthur Anderson.
- An international intellectual property consulting firm shared its experiences trying to keep track of experts in subject disciplines. With the numbers of experts now reaching the 100s, and more people in the firm with a need-to-know, they are seeking tools to help with the process.
- BCG shared its experience developing and using a system they have developed using MS applications. It includes about 25K writings from consultants, and descriptions of about 25K projects, as well as, resumes from their HR system. They have built a database of expertise for the 1000 employees who responded to a survey of their competencies. The results were edited and indexed centrally, an effort that took about 2 man-months to complete. This is updated through an annual survey. Experts self-description is prominently displayed through the searchable interface, and contains links to their email and a staffing request form, in case a project manager wants to retain them for a project. They are also using Contact Network Corporations' tool for maintaining links to human networking knowledge.
- For a very large law firm, the quantity of documents produced by individual lawyers is daunting. Getting a structure in place around the expertise expressed in the documents is very difficult. Senior people believe they know anyone that has expertise but knowledge capture is being driven by changes in the legal industry that required firms to be able to demonstrate their unique industry expertise. They are learning that efficiency is the key to survival. They are using broadcast emails looking for who has done what, or who knows what. This is not ideal and they know that there is a need for a good system of assembling and re-assembling knowledge.
- It was noted by one participant that the latest findings are that knowledge is most valuable when organizations know: where it is captured, how it is being captured and what the context is for capturing or finding it. It is important to know what the process was for these events and then how the content was used. These properties are represented as the packaging. If you give users good tools to capture the information they generate, this is part of the process but you need an editorial step to enhance and normalize the information that comes from the process.
- A description of the "Ask Audrey" system was offered. It was an outgrowth of employees at one firm asking a particular employee about anything or anyone, because she embodied the most corporate memory of anyone else. This evolved into a system for asking questions at a central location. Two commercial products, Participate and Abuzz, operate on similar principles.
- It was suggested that professional services firms can benefit from a system of tracking significant engagements, what they are, how many in various categories, and who is participating in them. This information capture is worth the investment

of the time of a person (or a few people) to do this if it results in being able to assemble the right team quickly to respond to a new opportunity.

- A similar concept that organizations are learning to pursue is to create metadata in project reports that can be tapped for finding out who the relevant people are, when and what they contributed to the project. Making this part of the standard process is critical. It needs to be done in situ periodically, and not left until the end of a project. Continuously populating the data should be a priority to insure future efficiency.
- In order to make routine capture of key data more reliable, team leaders or managers should build in routine questions for every regular briefing. People will get in the habit of coming prepared with that information, having captured it to have handy when asked.
- Another professional services firm described the religious exercise of weekly reporting. It was suggested that organizations should afford knowledge catalysts, knowledge concierges to do the capture and weekly updating for all levels of group work. At one consulting firm, the billing system requires that project team members complete the answer to a question about how they are spending their billable time, thereby establishing the nature of their work for a particular engagement.
- A contributor described a product his company is developing that is designed to capture items of relevance contextually, capturing such elements as who the people are who are involved in the production of a document, when something changes that will impact other content across the domain, and understanding the work in the context of the moment of work.

A number of topics were discussed for the next meeting:
- Determining the fundamentals for building an expertise locator
- How an expertise locator can be deployed as a linking mechanism for knowledge
- How we can achieve teamwork and integrate the content (team work, structured and unstructured data such as threaded discussions)
- How we can make knowledge more visible?
- What are our chief disappointments with what is out there in terms of knowledge management systems?