How To Set Up An Intranet[1] For Knowledge Management

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INTRODUCTION

Internet, Intranet and Extranet - three very similar terms referring to the same technology The main characteristic that determines whether something is an Internet, intranet or extranet is the application of the technology Is it out there for the public? (Internet) Is it for internal use? (Intranet) Or is it something that you are trying to share with your clients or with your partners? (Extranet)

What is more important and more interesting is the difference between information management and knowledge management A lot of people are confused and I have seen a lot of different definitions Having been part of a core knowledge team at Booz Allen implementing knowledge management, and then having worked at Morgan & Banks where I implemented an information management strategy, I want to share my definitions with you.

Information management is all about better managing information that freely exists in your enterprise Whereas knowledge management focuses on getting knowledge out of the heads of your staff and somehow organising that knowledge so that it can be reused and leveraged and so that it does not walk out the door when they leave.

If you are trying to address knowledge management in your organisation, technology is the easy part. Knowledge management is at least 80 percent organisational change management The key question is how you motivate your lawyers to take their knowledge and put it into an institutionalised system Technology certainly helps. You need technology to make it accessible. But the key challenge of knowledge management is not the technology, it is the change management.

THE BOOZ ALLEN EXPERIENCE

Booz Allen is one of the biggest management consultancies in the world. At Booz Allen our primary focus was knowledge management We felt that although there were a lot of information management projects we could do, getting a grasp of our knowledge management would be more valuable When a company hires a management consultancy, a great deal of information is generated. The company's business is analysed and many spreadsheet models are built. Reports are then generated from the spreadsheet models

At Booz Allen we were not interested in managing either the documents or the information that was produced. We distilled this down into what we called *knowledge nuggets*. Booz Allen had researchers, people who are generally from library science backgrounds, who were responsible for that knowledge The library science folks worked very closely with us and would extract the knowledge out of the reports They also worked very closely with the consultants and would abstract their reports and write knowledge abstracts

When you are looking at how you store and retrieve your information, whether it is knowledge nuggets or precedents, one of the key questions that you are going to have to answer is do you use structured or unstructured information? Do

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1 This article is an edited transcript of a speech delivered at the Law Librarians' Symposium on October 2, 1998

you take the documents as word files and throw them into a system and let engines like Fulcrum index them, or do you put them in a very formatted, regimented database? We debated this a lot and came to the conclusion that you need to do both.

The key element of the knowledge system is that it has got to be convenient to put the knowledge into the system At Booz Allen we had a knowledge management infrastructure - a group of librarians whose job it was to take ownership and management of the knowledge. I have never seen an organisation successfully implement knowledge management by empowering the end users directly and not having someone to do the sanitisation and quality control.

Any system has got to be easy to use or people will not use it. We did a lot of research about whether you should allow access by browsing or searching and we came to the conclusion that you should use both. To me the ideal metaphor is Yahoo! You can either search for what you want in Yahoo! or you can go down through topic trees to find what you want. I really think that if you are going to set up a user front end for knowledge or information you should be looking at that sort of a metaphor.

I believe that you should link relevant bits of knowledge For example, if a consultant was searching for a term like banking benchmarks. They would come to our search engine and they would tick boxes that corresponded to different categories of information, such as resumes, white papers, reports etc, and then they would do a search. The system would deliver a results list of all of the documents that it found. They would then click onto one of those documents and get an abstract that would include title, dates, types, practices, authors, the document itself would be attached, as say a Word file, and then there would be a one or two paragraph summary about it (Figure 1)

Typically we found that there were clusters of information or knowledge in our organisation. If I clicked on the author, for example, it would take me to the resume of the person who wrote the article. (Figure 2) So I could qualify the knowledge I was looking at. At the bottom of the resume a list of all the other documents that this person had written was dynamically generated because people tend to focus on a certain area. At the bottom of that you would see assignments – which would search for timesheets that our staff have to submit and provide a list of the assignments that the author had worked on. (Figure 3) And again, you might find that they worked on very similar assignments to the one you are researching, so you could click on the assignment details and bring up the details of that particular job. (Figure 4)

Morgan & Banks

At Morgan & Banks the issue is one of information management rather than knowledge management. We generate vast amounts of information both in Australia and around the world, so the issue is how to pull it from our different systems and link the information together. We built a Web-based structure which pulls information from our existing systems including recruitment systems, financial systems, and our human resource systems. At first you might wonder about the relevance of these types of systems But if you think about it the finance system is where all the timesheets go so that is where you get records of what people have worked on. Your HR systems contain staff resumes which is where you see the experience and the expertise your staff have. Both of them are very good knowledge management sources and so we pulled them together into an open database using the Fulcrum knowledge network product We index the unstructured information together with the structured information and then hide all of this from our consultants using an intranet front end. It only took us four months from the time we had approval from the Board even though we had no data warehouse, no developers and no servers and literally had to start from scratch.

Design is very important. Our challenge was to build a system that was friendly and easy to use and not too 'corporate' looking. We ended up with a fun, cartoony type interface. Don't call your system an intranet An intranet is a sort of techy geek term. Come up with a personality for it Any system worth anything has a cool code name or a personality. After much brainstorming, we decided to call our system MOL which stood for 'Morgies On-Line'. We asked the designers to develop a little mole character to be a tour guide on the system and help our people to use it. We built with

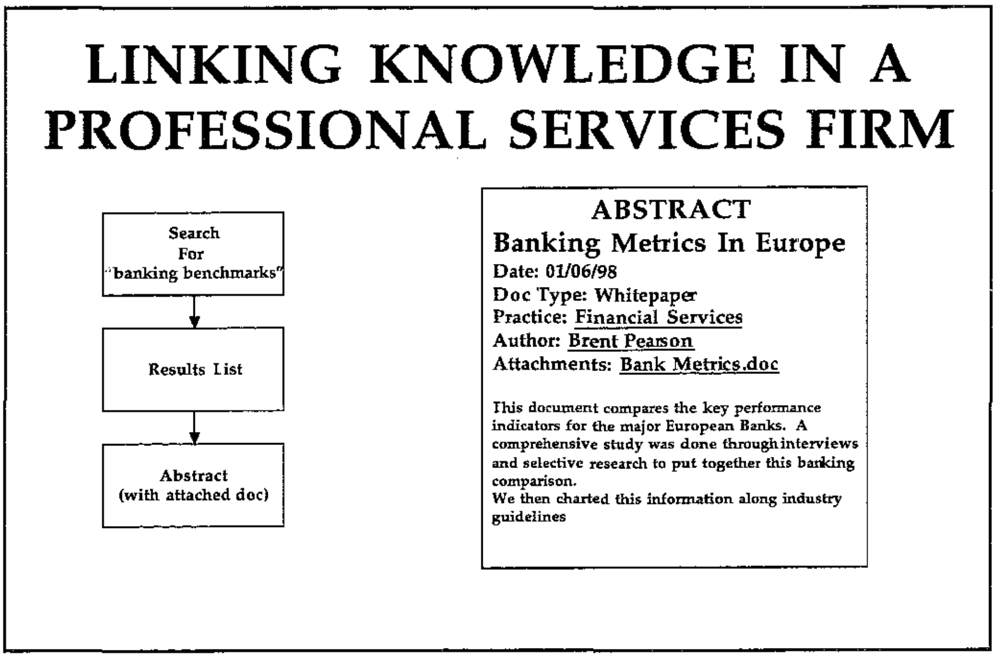

FIGURE 1

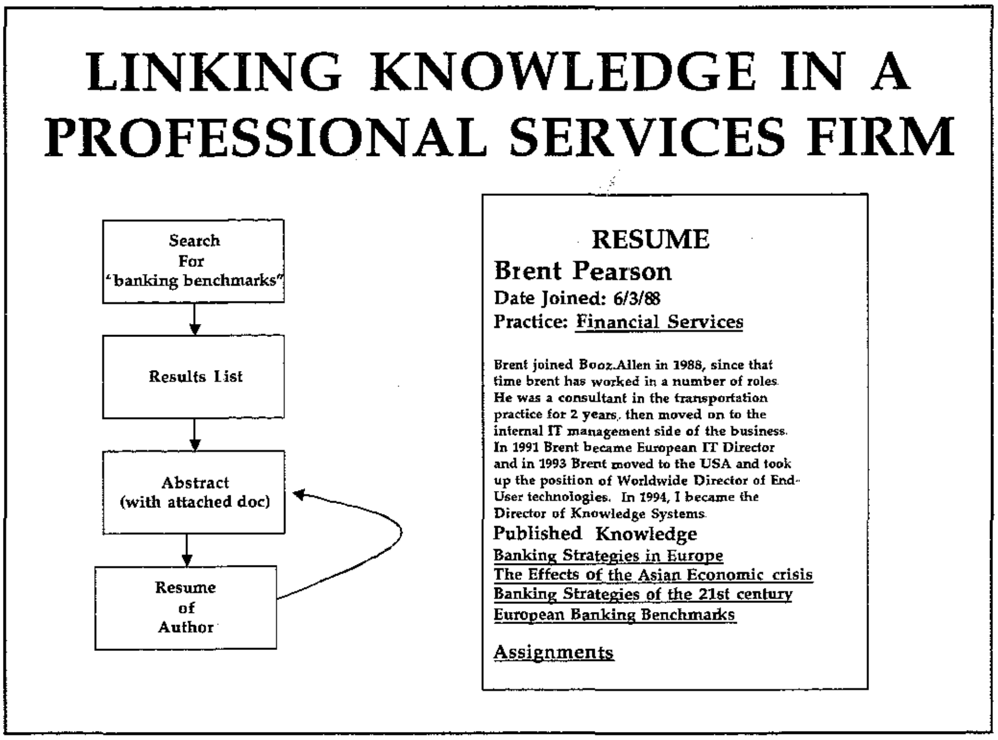

FIGURE 2

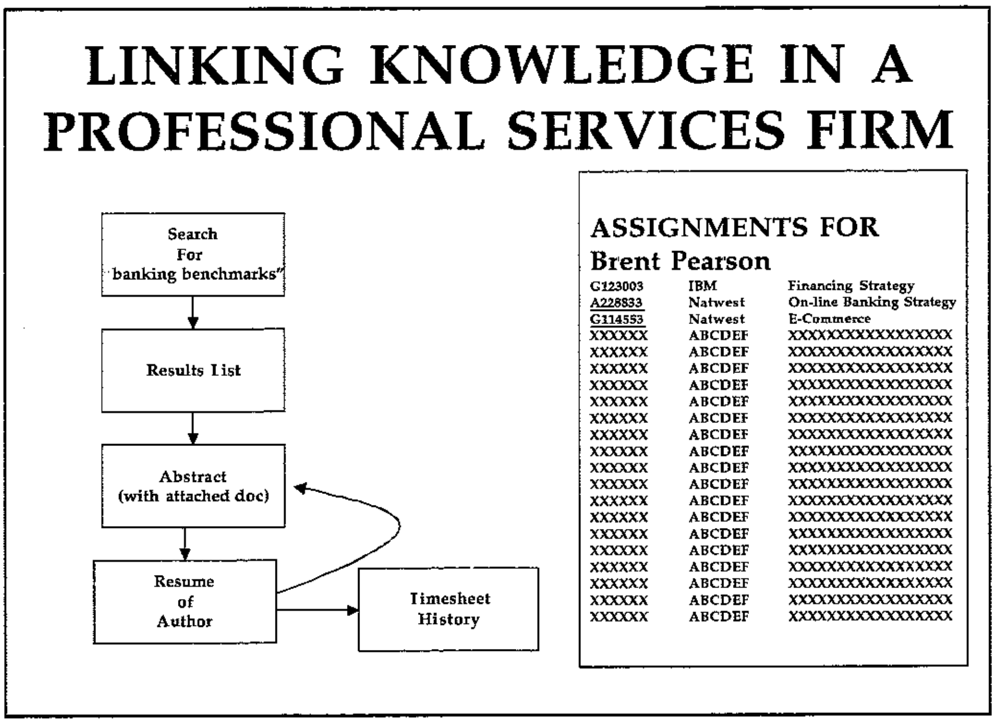

FIGURE 3

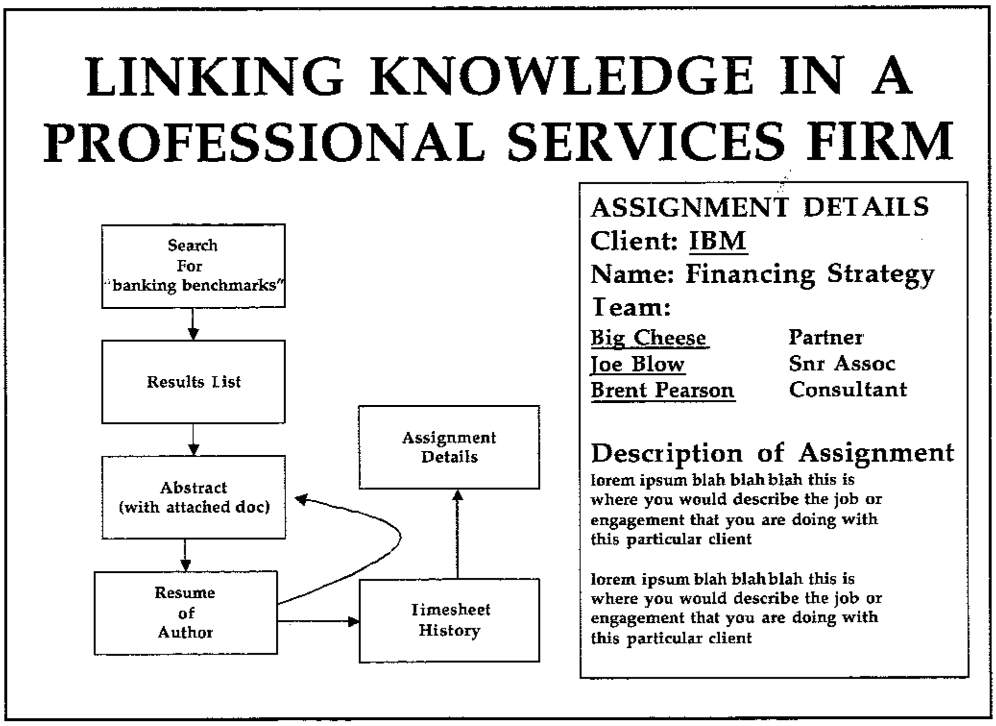

FIGURE 4

our users which is very important from a change management point of view. We met with our users every two weeks and showed them what we were doing, we asked them to help us with prioritisation and features, and quite often we showed them the result of their suggestions two weeks later.

Here are some of the features of the system:

Magazine

The first page includes a magazine which is an easy way to share what is happening in an organisation. Anyone can create a new magazine article by typing the full text into an online form and pressing a button to load it. It is all database driven so you don't need to be a web guru.

Policies and Procedures

All our policies and procedures are on MOL - search and selection, permanent recruitment, our business process, all the steps in running an assignment. This information is a great way to help new people get up to speed. It is very simple and probably the first thing everyone does on their intranet.

Staff Database

Our staff database originates in human resources. You can access any staff record which includes personal information, resume, photo and details about who the person reports to. Each staff member is responsible for updating their own information. This database is very good for doing simple look ups like finding who looks after transportation in our Melbourne office.

MOL University

MOL University is going to be like central training for us where we train our people and have all our internal courses.

Virtual Tour

We have designed a virtual tour of the organisation for new employees before they get a chance to be formally inducted. They can come into the virtual boardroom and meet the Directors. We created profiles of the Directors by asking them the same three questions. In that way you can get a feel for what they are like and how they differ from each other. We have also tried to capture their non-business sides. The virtual tour also includes a short history of Morgan & Banks. It shows the Directors when they first started and through the years. It is a fun little history.

Client Database

The client database is where we manage information about our clients. Information includes contacts, activities, business to date, who contacted them, who is marketing them, who is doing business with them. For key accounts we also have information about their vision and mission, their revenue, relationships, discounts we may give them, any HR issues they are currently working with, their current business issues. This is all just background knowledge of their account. It can be updated very easily by just opening an input box and typing in the relevant information. Records can include flashing lights and alert you to certain information that everyone must see when they do business with that client. For example – speak to Geoff Morgan before you contact this client. It is a fairly powerful way of managing clients and it is fully integrated to all of our information systems. I do not have to leave one system to go to another system it is just all there and where possible it is all linked.

Extranet

This is a new development for us. The idea is that we are now using this type of technology for managing our own internal knowledge and information we can also share it with our customers For example we give our clients the tools to manage their recruiting inhouse and reduce the amount of money they spend on recruitment agencies so that when they do spend money on an agency hopefully they spend it with us

The system includes all the standard job descriptions used by the client The job descriptions include key competencies for each type of position. From this information, a search expert works with a consultant and finds all the keywords and phrases for that position and constructs a query for each type of position that can be used as a preprogrammed search and can be run across the resume database at any time, providing a relevance ranked list of candidates that are most suitable for the particular position

It just shows you how you can use these types of systems to transcend the boundaries between your clients and your organisation. Ernst & Young's Ernie is a very good example of a professional services company that is offering a service over the Internet for their clients[2].

Question
You talked about the need for abstracting. Who actually did the abstracting - the authors of the documents themselves or a team that specialised in doing that type of thing?

Brent
At Booz Allen the librarians (knowledge managers was their official title) formed a partnership with the consultants so even at the proposal stage they would be involved in working on proposals for an engagement. If we won the assignment, the knowledge managers would identify pieces of reusable knowledge from the start. The knowledge managers usually wrote the abstracts but they would work quite closely with the consultants that would be actually responsible for generating that knowledge. The other thing that is important is that we actually measured how well people contributed to the knowledge bank and how much they actually used the knowledge. We wanted to make sure it was evenly balanced There is no point in having someone who takes knowledge all the time and doesn't give any back, and likewise there is no point in people putting knowledge up and not using anyone else's knowledge because they are reinventing the wheel

Question
Have you done very much work on measuring the value of a system like this? Justifying the time and cost in concrete terms?

Brent
That is the age old question and we have had plenty of discussions about it. We would measure any proposals that we had won, and we would measure whether or not what came out of a knowledge library had contributed to that. It is very hard, you know you might win one engagement and let's say, that it might be a multimillion piece of work, and if you use a bit of knowledge out of the knowledge bank do you save them millions of dollars. It is almost impossible to come up with a great business case, but there are plenty of studies now about intangible benefits of knowledge management.

Question
In the case that you just mentioned what sort of charge did you put on the reuse of people's knowledge? For example you could compare it to the reuse of an existing inhouse precedent How do you charge out for that when the drafting is already done?

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2 www.ey.com

Brent

We didn't charge for downloading from the knowledge bank per se. Just after I left Booz Allen I believe they started the practice of setting aside a certain amount of time for all of the consultants to write up their knowledge from that assignment. I think that is really important because in organisations where billability is king no-one is going to work nights and weekends or non-billable time when there are billable opportunities, so I think in scheduling time for engagements you have to cost knowledge management into the assignment. So effectively the clients were paying for that knowledge management effort.

Question

What database software did you use for the client records and resumes and did you find they worked well with Fulcrum?

Brent

We had a mixture of legacy systems. We moved it all into an open dataware warehouse which is a Microsoft sequel server database. Fulcrum is pretty flexible at getting to most systems, our resumes are indexed on our Unix system but all the structured data reaches into the Microsoft sequel server database.

Question

What privacy issues were involved in having a resume sent and clients being able to have access to it?

Brent

We adhere very strongly to the privacy principles. Bear in mind that the client can only access those resumes that were sent to them, that we are managing anyway, so they are not accessing our main Morgan & Banks database.