Masterclass

Knowledge re-use

Re-use strategies

Knowledge re-use and capture is surprisingly challenging in project-based organisations. But there are some tools and techniques that can help to overcome any potential hurdles.

By Marko Kiiski

Imagine the following scenario, one that is quite common in many project-based companies these days: a company wants to increase its bid win-rate as well as its project delivery margins. As a consequence, the knowledge management (KM) team is given the task of promoting the re-use of existing expertise, analysing win/loss reports and capturing key documents from engagements so that they can be used in the future.

Unfortunately, the bid teams do not create win/loss reports that articulate the reasons why a deal might have been won or lost and they don't seem to be looking to re-use existing collateral, either.

Typically, all project deliverables are created from scratch. Furthermore, the newly created collateral is not shared beyond the core project team.

What makes the teams reluctant to re-use, capture, and share collateral? Three commonly reported reasons include:

1. Employees say that they have no time;
2. Employees suggest that they are unclear about how and where to re-use anyway;
3. Employees do not think that they need to spend time on capture and re-use.

This article will therefore focus on these three reasons and how they can, perhaps, be overcome.

Out of time

Let's have a look at the first of the three main reasons: lack of time. That is not as weak an excuse as it sounds. In project-based organisations, an employee's worth is primarily measured in terms of their 'utilisation'. That is to say, the amount of time they spend on customer sales or delivery – anything 'billable' or that may lead to a sale.

Given the importance of this core metric and its direct impact on corporate profitability, these organisations naturally tend to push their utilisation rates as high as possible – there should be nobody 'sitting on the bench'. In this type of environment, employees are therefore very quickly moved from one customer engagement to another and naturally have very little spare time. What is more, in most organisations of this nature, knowledge re-use and capture efforts are typically not included in core utilisation metrics, unless they form part of a bid plan or a project and can be identified as specific tasks and deliverables.

That just leaves the time between engagements, which unfortunately is very short. Employees have to fit development and other activities, such as administration, working out and filing expenses and preparing for quarterly or annual reviews into this short window of opportunity. The idea of identifying and contributing re-usable material comes pretty near the bottom of everyone's to-do list.

In most cases, employees are unwilling to sacrifice all of their personal time for work purposes – understandably. Often, too, lack of time pushes people to keep all the valuable content they have amassed on their personal laptop computers where no one else can access it. He or she may well leverage it in the future and perhaps even pass it on to a trusted colleague, but has no time to do anything else with it.

Such practices raise an important question: how do members of staff know it is the best information that they can get hold of if they are reluctant to share and compare both information and lessons learned?

'No time' as an excuse is therefore an organisational issue and to resolve it, it has to be addressed at the management level with significant input from the KM manager in the organisation. It can also be an attitude or perception problem as well, because quite often there are pockets of people who re-use and contribute just because they want to, whether or not the business supports it.

An additional approach could be to initiate tight integration between KM, sales and project-management processes. For example, in project review and closure, include lessons learned and reusable material capture activities. Further, in the sales process include steps to identify what reusable material is available to the delivery team. This can help to build sales credibility as well as improve pricing accuracy for the actual project delivery. Lessons learned is also good to include towards the end of the sales process for both won and lost deals to capture any 'learning' that can be used to drive improvement initiatives.

But again, integration can be achieved only when it is done at the organisational level because it involves changes to the key processes and cultural change – as capturing negative lessons learned can be challenging. Clearly, management needs to lead the change by setting an example. For instance, they could initiate the creation of a community to share best practices and learn from their peers on key topics, such as how best to conduct performance reviews.

Clarity and re-use

The second issue is a situation where the employees are unclear how and where to find reusable content. This is mainly a result of missed or confusing communication. Often, sales and project teams that work at customer sites do not have regular access to something as basic as their corporate e-mail account. When they finally return to the office, they are greeted by a backlog of hundreds of e-mail messages that will either be read and dealt with hurriedly or simply 'block deleted'.

As a result, e-mails with key information on knowledge re-use and capture will inadvertently be discarded. This is mainly a matter of business priority, since people delete or do not read the e-mail there is little or no emphasis on its importance to the business priorities. How can this be improved?

First, the provision of web access to corporate e-mail, in addition to the standard e-mail application in the office, needs to be considered – even taking into account the many flaws of some of the most popular packages available on the market to facilitate such an action.

E-mails themselves need to be short, consistent and to the point, so that the reader sees the important part of the message, even in an e-mail preview screen. Additional communication and training can help to address this particular aspect of the issue, but it is susceptible to the business priority issue discussed above.

On top of that, unintuitive user interfaces and navigation in the KM-application environment can also make it difficult and time consuming to understand where and how to find or contribute collateral. If the KM environment and communication are not designed with the end user strictly in mind it is likely that those seeking to re-use will quickly give up because engagement schedules are so tight.

Effective intranet search tools can help, but they typically require access to the corporate network, which is always a challenge to off-site sales and project teams. To address this problem, the company could provide a knowledge-search service, helpdesk-style support, a team dedicated to search reusable assets, and subject-matter experts that could be used by offsite and on-site teams to help them.

For example, when putting together a customer proposal to a tight schedule, a knowledge-search service could work with the bid team to ensure that the best available content is used or to find a subject-matter expert who can help with a particular section within the proposal. To make the knowledge-search service easy to engage, it should be free of charge, and provided over the phone, by e-mail or even in person.

> In project-based organisations, an employee's worth is primarily measured in terms of their 'utilisation'. That is to say, the amount of time they spend on customer sales or delivery – anything 'billable' or that may lead to a sale.

A possible drawback is that the knowledge-search service can lead to a situation where the bid and project teams demand collateral, but do not spend the time themselves to identify exactly what they need or to provide feedback on the collateral found or contact usefulness. Disciplined working practices and an operating-level agreement can help in the management of these cases.

The KM environment architecture, search mechanisms and knowledge-search services are organisational issues and should therefore be addressed within the KM team, while supporting the overall corporate business objectives. Significant input is required from end users to get the design right and to minimise the impact of unwanted technical limitations.

Not necessary

This brings us to the third issue: employees do not think that they need to spend time on capture and re-use. In most cases, they think that somebody else is doing it. Or they feel that they have nothing to share.

However, most of them do share and re-use content, such as customer presentations, project plans and technical designs held on laptops and through their personal networks. The issue is mainly up to the individual, but there are organisational elements that can encourage or discourage this type of behaviour.

At the organisational level, including measures on re-using, capturing and sharing collateral in annual employee reviews can help to push people in the right direction. In order to be effective, the measures need to be tailored to the employee's role and experience. The communication, sales and project-management processes should also encourage capture and re-use to ensure employee awareness, participation and check points in the project management or sales reporting templates.

There are also employees who claim that they simply cannot capture and re-use. They will often cite the 'unique' nature of their work, so when confronted with such a claim, it may be worthwhile to check if this argument is valid.

It may be the case that in certain time and material engagements, the customer buys a specific number of hours of the company's resources to do work for them. Under such circumstances, contract terms and conditions frequently state that the employee is not allowed to leverage any intellectual property from the customer company (generated during the engagement) after it has finished.

Employees' trust of their colleagues – or lack of it – is also likely to encourage or discourage re-use, capture and, most importantly, sharing. The trust element is directly linked to the organisational culture, along with legal or privacy implications that document sharing may have.

In addition, there is a widespread perception that keeping all the collateral and experience to oneself creates job security and a sense of indepensibility. It could be argued that re-organisation and workforce reduction programmes can reinforce this – either as a lever to try and secure their jobs, or because if someone feels vulnerable, they will feel that there is little point in sharing information that could help the organisation that made them redundant when they are long gone.

These are issues that need to be dealt with on an individual basis. The employee's manager can address them with appropriate metrics, coaching and training. At the organisational level, management should have in place clear standards on how to conduct the company's business outlining, in particular, intellectual-property laws and rules.

In conclusion, before committing to improve bid-win rates and project-delivery margins, the KM team should take a long, hard look at the three high-level issues identified and discussed here to understand where their organisations are, and to set the right expectations with the management team.

While seeking to improve organisational aspects and those of the individual, it is imperative to have strong support from senior management as these issues can have a profound impact on employees, customer satisfaction, people management and, potentially, even the organisation's IT architecture and applications.

Project management and management of change techniques are the core competencies that will help the KM team during the journey. ■

Marko Kiiski is a knowledge management consultant with Hewlett-Packard Consulting and Integration. Gill Wignall and Stan Garfield, Hewlett-Packard Services, contributed to this article.