

Getting and Sustaining Buy-in for a Knowledge Management or Knowledge Organisation Project

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With thanks to our distinguished panelists:

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A KM initiative in an Industrial Automation company had two main thrusts to standardize project execution – (1) formalising a global engineering standard, and (2) encouraging the sharing and propagation of best practices through CoPs. The first thrust worked, but the second settled over time into a more organic change in domain based structure and lessons learned sharing became a business KPI. Engineers were willing to share where the technologies were rapidly changing and they needed to keep up, but in most cases the attitude was “why should I share my results with others?” There was management support from the regional team but the effort fizzled out because the buy-in from the ground was not there – the required behaviour was not natural to the engineers.

Ten years later, there was a new, more formal initiative, across the whole company, and nominated subject matter experts, who were responsible for setting up and driving the sharing of domain knowledge, supported by a KM portal. The sponsor was a senior vice president from HQ, and the Chairman of the company stated that participation was compulsory. This was backed up by visits to the country directors to get their buy in. This time there was no big bang launch, just a constant flow of communications. This initiative was much more successful.

Lesson: key factors in success – where behaviour is not natural to end users it is important to make the initiative mandatory and formally structure it into work. Follow up with multiple conversations down the management line, so that everybody gets the message in the context of their own business.

An IT services company was organized into three distinct lines of business, operating more or less independently. While there was opportunity to share knowledge – eg software codes, there was no structural incentive for the business lines to share. One of the core capabilities of the organization was their project management experience. The initial KM initiative focused on documenting project management experience to allow the younger project managers to be able to benefit from this. One of the challenges was with documenting project management experience and lessons into the KM portal. The project managers claimed they had no time. The solution was to define the knowledge and lessons capture as a part of the project management SOP – the project was not formally closed out until the lessons and experience had been documented.

The company also set up a CoP to share the project management experience. The format of the CoP was formally and structured with the KM team taking responsibility for the program. It went very well. After a year, the CoP leaders took over ownership of the CoP, setting their own guidelines and focus areas.

A second CoP initiative with business development managers did not go so well initially. The KM team realized that business development managers do not want to spend half a day in a formal structured program. It is not natural behaviour to them. So the team reconfigured the activities, made them more informal, and in more relaxed setting, and had senior leaders share experiences of closing big deals.

Lesson: key factors in success – it is important to know the work culture and configure the KM activities so they fit that culture – this can vary from audience to audience. KM needs to be embedded into work, and into standard operating processes, and not layered on as an optional extra to work.

In an oil and gas multinational there was a top-down initiative to build a taxonomy to structure information in shared folders. Everybody was gathered into an auditorium, and briefed on the project, the desired outcomes, and the resources required. It took 6 months of negotiation and effort, supported by senior management – it was very challenging to get people to agree on a common structure. When it was finalized and ready to roll out, they discovered that actually most people kept their key information on their own hard drives, and not in the shared folders. People did not see the value of lodging “their” documents in a shared set of folder. They preferred their own. It was also not clear to the department heads what the business value of using a common set of shared folders was.

In a later job in the public sector, this experience came back. So when there was a KM initiative, this time, instead of an auditorium briefing, the KM lead visited department meetings one by one, and engaged them in conversation to discover their business challenges, and understand their core business processes. All business processes have knowledge needs and knowledge gaps, so the KM initiatives were generated from the challenges that were shared.

Lesson: key factors in success – start with a discussion of the business, not KM. The KM opportunities will emerge from the business challenges. Often you don’t even need to talk about KM, start with the business challenges, show value, and then you will get trust and buy in from the business. This approach requires a different set of competencies - not so much IT and information management skills, but soft skills – communication skills at multiple levels in the organization, social skills, and business analysis skills. The KM team should not be sitting in their cubicles, they should be out in the organization talking to people to understand business issues and explore how KM can help reduce knowledge gaps in their business processes.

In the Singapore public sector, CoPs have gained a lot of support. In the public sector, the problems cannot be met through formal training alone. They are complex problems that can only be met through conversations and experience sharing. The incentives to hoard knowledge are also not as pronounced as in some other contexts, such as commercial contexts. CoPs are very easy to get started – you just need to create a space and opportunity to have conversations. The KM intervention is easy to do, CoPs seem a natural fit, and the barriers to participation are not so strong. This is why they have seen such growth in Singapore. A number of Public Sector organisations have been cultivating CoPs for a number of years. For example, Ministry of Education has CoPs in schools. The National Council of Social Service sponsors and supports a number of CoPs around various social service areas.

Lesson: key factor in success – choose a KM intervention that is a good fit for the problem, and easy to implement and show value from.

DISCUSSION

There is a lot of talk about the value of non-training approaches to learning in Australia, but still the bulk of time and money goes on training. There are structural reasons for this – training budgets are a regular component on the books, and there are clear metrics and lines of accountability associated with training, while there are not for the “softer” non-training approaches. The HR department, and training providers (eg through subsidies) are not incentivized to change the way they operate. The onus is on learning providers and KM activists to answer these questions on the quantifiable value of these non-training approaches. Some of these metrics are starting to emerge – eg for CoPs, the University of Manchester has produced a framework for documenting activities, insights and the application of knowledge from CoPs, with the outcomes. Right now, many KM metrics cover outputs not outcomes. KM needs to look at business outcomes, and take the approach of business partnership with other functions in the organization. One of the speakers gave an example of how proposal cycle time was shortened from 2 months to a month through KM.

Lesson: apart from senior leadership, heads of department and front line employees, there are other stakeholders that can help or hinder – eg HR, and there are sometimes structural inhibitors in the form of existing budgets, functional responsibilities, and funding mechanisms. If these are to be addressed, then clear metrics covering business outcomes need to be developed and used.

Do we have this whole question about buy-in the wrong way round? Why do we proceed by saying we have to begin by persuading people of the value of KM? If the business needs are placed upfront and the value of KM is transparent then buy-in should be a given. This was exactly the approach of the public sector example earlier. One of the contributors to the November 2015 KM World discussion on this topic said he proceeded by visiting departments and mapping their business activities and challenges, and then helping them to identify knowledge needs and gaps that affected

their challenges. He recommended “don’t use your own (KM) words; use the language of the business.”

Lesson: it is essential to understand the context(s) you are attempting to deliver into, and to use the language of your target audience – whether it is the line of business, or the senior leadership, or specialized functions whose support you need. Start with business needs and identify ways in which KM can help – buy-in will follow, especially, when you start showing results.

Our Hong Kong participant shared an example of a records management project that was championed by the CEO of a major multinational. The records management programme was rolled out in Asia very successfully, over several CEO transitions, but it did not take hold in other regions. The leader was asked to head up global records management rollout from European HQ. Push back was immense, and despite CEO support, operational people at the HQ were dismissive. While senior support was given it was not seen as high priority. Success in Asia could not be made sustainable elsewhere.

Lesson: sometimes you can do everything right, to get buy in, but there will still be failure factors beyond your scope of control. Motivators to act on KM-related initiatives may vary from geographical context to geographical context. Sometimes senior leadership think support is simply endorsement and perhaps funding – they may not understand what “support” really means in terms of ensuring it is a priority, is given political cover, enforcement, and so on.

One of the speakers spoke about the importance of a “layered” approach – get senior buy-in and direction from the top but then go to all the business owners one by one, and systematically get their buy in, in terms that make sense to them. The ultimate goal is to have something measurable for the front line people so they feel there is something in it for them. KM buy-in is not about communication, it’s about delivering. Once you have buy in in terms of operational benefits, habits and mindsets will follow, and the KM initiative will be sustainable, even if you get leadership transitions and shifts in focus from the top. Top level support is useful to help everybody see this is an organizational priority, not just a narrow functional project. Make sure the funding responsibility for KM projects transitions to the business after kick starting it for a year or so – this forces it to become accountable for results to the business.

Lesson: in the Washington DC knowledge café discussion, participants suggested that second and third tier support is sometimes more important than top tier support, because those people tend to stay in post for longer, and can sustain continuity. It’s always a good idea to have several senior stakeholders on the boil for buy-in. The conceptual framework and approach needs to come from the entire middle to senior management layer and be owned by them. Delivery needs to make sense for the front line as well.