

Using Knowledge

> > > Advances in Expertise Location and Social Networking

An APQC best practices benchmarking study

This study is designed for those seeking to:

- Understand how Web 2.0–type social networking tools and applications support knowledge transfer and expertise location
- Build a business case using emerging best practices
- Understand how to engage subject matter experts
- Encourage and motivate adoption and participation for all involved
- Evaluate the impact and ROI of expertise location and social networking approaches

STUDY importance

Locating expertise is one of the hottest issues facing organizations today. Considering today's fluid work force that changes jobs frequently and the baby boomers that either have retired or are preparing to, knowledge is harder than ever to identify, maintain, and leverage.

So, how do organizations identify the experience and expertise they have in-house and make it available to execute projects, to develop proposals and win business, or simply to answer questions? Do organizations use standard communities of practice and expertise locator systems, or do they invest in and deploy social networking applications? And really, what is the difference between expertise location and social networking?

Recently, many organizations have witnessed a convergence of the social networking process and the process to identify experts or expertise in a given area. In fact, communication and general networking often occur within the same social networking site, intranet, or portal used for expertise location in these organizations.

Another challenge facing those charged with expertise location concerns expertise (explicit knowledge) vs. advice (good judgment and experience). With the increasing popularity of interactive Web 2.0 tools such as social networking applications, blogs, and wikis, the giving and receiving of advice now has complexities that were not on the radar a few years ago. There are far more "advisers" involved, and the skills and capabilities required for expertise are not necessarily the same as those needed to advise.

Can new social networking tools solve participation and content maintenance challenges that plague organizations' expertise location systems? These issues and more will be addressed in APQC's "Using Knowledge: Advances in Expertise Location and Social Networking" benchmarking study. The study will focus on the strategies, enabling processes and systems, business rules, and change management needed for effective expertise location.

APQC Customers Speak

- **How do we identify our experts or those with the necessary experience to staff projects or programs?**
- **What's an effective way to expand and manage our networks of experts?**
- **Do we need a formal expertise location process and system? What about existing CoPs and/or networks?**
- **How do we differentiate between expertise and advice?**
- **How do we make it more conducive for highly-skilled specialists without much flexible time in their schedules to collaborate?**

1. Strategies for Effective Expertise Location

- The differences between formal (purpose-built) and informal (user-driven, social) expertise location and the pros and cons of each approach
- Which solutions make sense for different organizational needs and business drivers (i.e., some organizations need to find experts for projects and best practices whereas others want to enlarge their advice networks to respond to the immediate needs of fellow employees)
- Domestic and international legal and ethical issues (e.g., privacy acts, scanning e-mail, disclosure, and voluntary compared to mandatory content)

2. Enabling Processes, Business Rules, and Tools for Expertise Location

- Processes and approaches to understand what knowledge is needed, what knowledge already exists and where, and how to organize that knowledge so employees can tap into knowledge objects and/or tacit knowledge (allowing for connecting knowledge consumers to knowledge objects or tacit knowledge)
- Processes and approaches to support expertise location (e.g., social network analysis, communities of practice, and personal social networks)
- How best-practice organizations effectively manage their subject matter experts' time (e.g., getting permission to use their time, using project charge codes, and charging back time)
- IT tools that assist in finding the right expertise quickly and efficiently, such as social networking applications (e.g., Facebook™ and LinkedIn™), and social computing
- Determine whether to use existing technologies for expertise location, blend those with new systems for social networking, or use new social networking approaches
- How social networking relates to the use of wikis and blogs
- The design and deployment of expertise location systems

3. Organizational and Cultural Issues

- Funding and governance models used by best-practice organizations
- How best-practice organizations encourage and motivate adoption and participation for all involved (those with expertise as well as those seeking expertise)
- Reluctance of employees to keep their skill profiles up-to-date
- Training and communication required to support effective expertise location and adoption by different groups

4. Impact—Indicators and Measures of Success

- How leading-edge organizations evaluate the impact and ROI of expertise location and social networking approaches

THE subject matter experts

James Lee, PMP

Knowledge Management Practice Lead
APQC

James Lee is APQC's Knowledge Management practice leader. He is responsible for leading projects from initial problem structuring through delivery of the solution and ensuring the quality of the deliverables and the transfer of best practices.



Lee's experience includes significant work in the manufacturing, military, retail, and professional services industries. His clients have included large organizations developing their enterprise knowledge management strategies. In addition to KM strategy, Lee's background in process improvement has resulted in significant cost and time recovery for organizations where he has conducted process mapping and re-engineering projects.

Lee was also the subject matter expert for APQC's studies *Retaining Today's Knowledge for Tomorrow's Work Force* and *The Role of Evolving Technologies: Accelerating Collaboration and Knowledge Transfer*.

Darcy Lemons

Senior Project Manager, Knowledge Management
APQC

Darcy Lemons is a senior project manager with APQC's Customer Solutions Group. In her nine years with APQC, she has led numerous benchmarking studies focused on best practices in knowledge management, learning, and leadership development.



Lemons was the senior project manager for APQC's benchmarking study *Retaining Today's Knowledge for Tomorrow's Work Force* and a special adviser on the benchmarking study *The Role of Evolving Technologies: Accelerating Collaboration and Knowledge Transfer*. Additionally, she coauthored APQC's *Capturing Critical Knowledge from a Shifting Work Force* (2003).

Carla O'Dell, Ph.D.

President
APQC

Carla O'Dell's work in the area of KM dates to 1995 when APQC conducted the nation's largest symposium on KM with more than 500 attendees. The thrust of O'Dell's current work is knowledge management and sharing best practices. Under her direction, APQC has become a national leader in conducting and producing knowledge management best practices consortium studies and publications, as well as in helping executives develop a powerful and results-oriented KM strategy.



She is the author of *The Executive's Role in Knowledge Management* (APQC Publications, 2004), as well as *American Business: A Two Minute Warning* (Simon & Schuster, 1988) and *If Only We Knew What We Know: The Transfer of Internal Knowledge and Best Practice* (Free Press, 1998).

OUR history

APQC's extensive history in knowledge management includes 19 consortium benchmarking research studies. A list of these studies follows.

- *The Role of Evolving Technologies: Accelerating Collaboration and Knowledge Transfer* (May 2008)
- *Retaining Today's Knowledge for Tomorrow's Work Force* (2008)
- *Leveraging Knowledge Across the Value Chain* (2006)
- *Using Communities of Practice to Drive Organizational Performance and Innovation* (2005)
- *Integrating Knowledge Management and Organizational Learning* (2005)
- *Facilitated Transfer of Best Practices* (2004)
- *Virtual Collaboration: Enabling Project Teams and Communities* (2004)
- *Expertise Locator Systems: Finding the Answers* (2004)
- *Measuring the Impact of Knowledge Management* (2003)
- *Using Knowledge Management to Drive Innovation* (2003)
- *Retaining Valuable Knowledge: Proactive Strategies to Deal with a Shifting Work Force* (2002)
- *Managing Content and Knowledge* (2001)
- *Building and Sustaining Communities of Practice* (2001)
- *Successfully Implementing Knowledge Management* (2000)
- *Creating a Knowledge-Sharing Culture* (1999)
- *Expanding Knowledge Management Externally: Putting Your Knowledge to Work for Customers* (1998)
- *Knowledge Management and The Learning Organisation: A European Perspective* (1998)
- *Using Information Technology for Knowledge Management* (1997)
- *Emerging Best Practices in Knowledge Management* (1996)

ABOUT APQC

Founded in 1977, APQC is a member-based nonprofit serving approximately 500 organizations worldwide. An internationally recognized resource for process and performance improvement, APQC helps organizations adapt to rapidly changing environments, build new and better ways to work, and succeed in a competitive marketplace. With a global focus on productivity, knowledge management, benchmarking, and quality improvement initiatives, APQC works with its member organizations to identify best practices, discover effective methods of improvement, broadly disseminate findings, and connect individuals with one another.

KEY dates

May 16, 2008	Early bird discount expires (Save \$1,500)
June 18	"Meet the Sponsors" Conference Call
July 15	Study kickoff meeting in Houston
September to October	Best-practice partner site visits
December 9-10	Knowledge transfer session in Houston

Study sponsorship fees:

APQC Members	\$18,000
Nonmembers	\$24,000
Professional services firms/vendors	Please contact APQC

Sign up by May 16, 2008 and save \$1,500 on sponsorship fees!

There are advantages to involving multiple business units or operating companies. Please contact your account representative for details.

THE benefits of sponsorship

APQC's consortium benchmarking studies provide participants a proven way to identify best-practice approaches and connect with others around topics of mutual interest. Over the past decade, APQC has conducted more than 140 benchmarking studies that have enabled organizations to add millions of dollars to their bottom lines through the implementation of best practices and processes based on benchmarking research and study findings.

- **Capture proven, actionable best practices** you can adapt for your organization at a **fraction of the cost** of conducting benchmarking projects on your own.
- **Gain access to organizations** through face-to-face site visits at best-practice partners. **Learn firsthand** about leading-edge practices and innovations.
- **Influence the study's direction.** Review and refine study objectives and scope, help select best-practice partners, and give input on the data collection tools.
- **Interact** with peers from other organizations and learn directly from experienced practitioners.
- **Gain access to world-class knowledge** in a short span of time.
- **Involve your colleagues, senior executives, and process champions** by bringing them to the concluding knowledge transfer session so they can also take advantage of the key findings discussions, best-practice partner presentations, and networking opportunities.
- **Receive a detailed final report** including key findings, aggregated quantitative data, and in-depth case studies of best-practice partners.
- **Establish a network** for ongoing communication and implementation assistance.

"APQC has a high-quality process and is a good value for the money. I have participated in studies with other groups, and APQC's method is far superior. The ability to see where we sit in relation to other companies and to set a vision of where we want to go has been the most beneficial aspect."

—Patrick Powaser, Occidental Petroleum Corp.

"Thank you for APQC's commitment to thinking ahead, anticipating, and innovating all the time."

—Diane Alario, U.S. Army, ARDEC

"This was a very rewarding experience - I learned as much as I contributed. Congrats on putting on a class event. Good job."

—Mark Neff, CSC

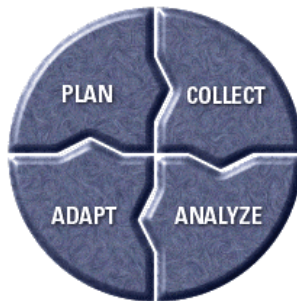
"[APQC's research] gives you the opportunity to be exposed to other organizations and their practices."

—Robert Blanchard, U.S. Navy

Consortium benchmarking studies employ APQC's award-winning benchmarking methodology and provide access to proven, real-world best practices from knowledgeable practitioners and leading organizations. APQC's goal is to **maximize the benefits** to partners and sponsors while **minimizing the amount of time** participants spend working on the project. You will get the knowledge and information you need to make major improvements in a fraction of the time and cost it would take to conduct a true, external best-practice study on your own—approximately **one-tenth of the cost of one-on-one benchmarking**.

consortium
quick fact >>>

On average, each APQC consortium benchmarking study takes 1,000 hours for APQC to complete—the equivalent of having one fully dedicated APQC resource conducting benchmarking research on your organization's behalf for six months.



Study Planning: Sponsors help choose site visit hosts from a pool of screened best-practice candidates, refine data collection tools, and discuss current issues and trends in the topic area being studied.

Data Collection: APQC and sponsors then collect qualitative data through sponsor participation in site visits and quantitative data through detailed questionnaires collected and analyzed by APQC. All quantitative data will be blinded and aggregated in accordance with APQC's Benchmarking Code of Conduct.

Data Analysis and Reporting: APQC presents the analyzed data and best practices at the study's concluding meeting, the knowledge transfer session (KTS). This event brings together the study sponsors, best-practice partners, and subject matter experts for targeted discussions, presentations, and networking.

Adaptation of Study Findings: After the KTS, for an additional fee, APQC can help sponsors apply what they have learned to create action plans for their organizations.

Our research team handles the legwork, which allows you to balance your time and priorities while gaining valuable best practices.

For more information, please contact:

800-776-9676 • +1-713-681-4020

E-mail: apqcinfo@apqc.org

Web site: www.apqc.org