

Garry Cullen was taking a break from his job as matchmaker for knowledge seekers and sharers in the Australia office of Lend Lease Corporation when he checked into the Association of Knowledgework's K-Net discussion group. There he spotted another knowledge seeker, KM maven Melissie Rumizen, saying: "I've benchmarked expertise locators such as BP Connect and others. I've heard presentations from software vendors such as Tacit. What I've never heard is anyone who can tell me what value they have delivered. Is there anybody out there with experience with either an in-house expertise locator or one generated by software?"

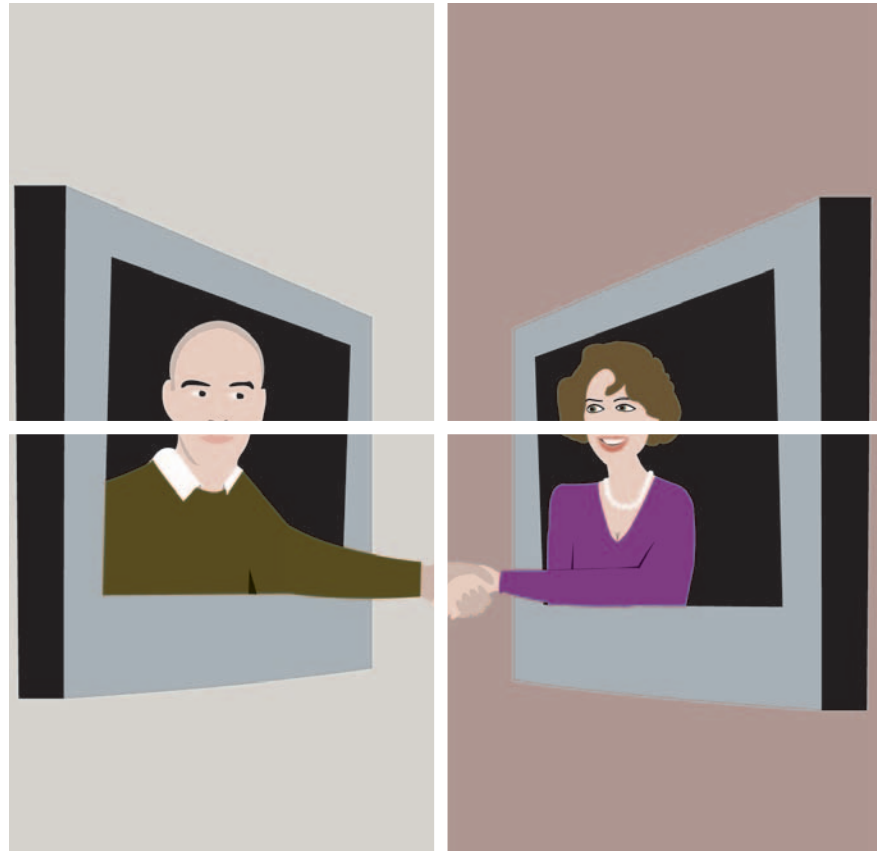
Naturally Cullen responded, because that's the way collaboration begins via ikonnect, the knowledge-sharing system available to nearly 10,000 Lend Lease employees and the employees of countless clients located across six continents. It is probably the most unique and effective system of its kind in the world, and it is not database driven.

Its fundamental principles are based on Lend Lease experience and objectives:

- Databases fail to get knowledge moving;
- There is substantially more knowledge inside heads than databases;
- Customer service is best achieved through the best available knowledge;
- Conversations are the best way to transfer knowledge;
- Knowledge transfer begins with a question.

Cullen didn't need to contact a third party to match Rumizen to the expert. He was the expert and –in Rumizen's own words – he "bowled her over".

Although the ikonnect logo is trademarked and the supporting software has a patent pending, the business process itself is a human process and is not proprietary. With regional head



Expertise location

Low tech, high touch

An expertise-location programme that disavows databases and focuses instead on starting with a question, and putting people in touch with other people. **By Jerry Ash**

offices in Sydney, New York and London, Lend Lease not only uses it, but shares it freely with its clients – and now with readers of *Inside Knowledge*. The solution is a great deal simpler than the problem and can be home grown at a fraction of the cost and many times the value of a data-based system.

The issues

Common complaints against data-based expertise-locator systems include the fact that they generally only document internal knowledge; capturing all of a given person's experience or knowledge

is impossible; people prefer to search human networks first; the scope of the data included is limited by the amount of time an employee can or will devote to inputting it; all expertise-locator systems are supply driven; and the supply (known knowledge) doesn't necessarily fit the demand (the specific question a colleague has to ask).

Rumizen, who recently moved from Buckman Labs to SAIC, is an expertise-locator sceptic. She voices the following complaints.

Databases look internally. "Expertise locators, as with other databases, are

too often based on the assumption that all knowledge or experience needed can be found internally,” she says. “That claim is impossible to prove or

People prefer networks. While an expertise locator may point to a possible source of knowledge, Rumizen argues that “no-one likes to make the

- Being able to gain timely access to that person;
- The willingness of the person to engage in problem solving

People prefer networks. No-one likes to make the dreaded salesman’s cold call to someone they do not know”. People prefer to contact people they know or who are known to be approachable.

disprove, but we do know that most people rely on their own personal experiences in searching for people with answers, experience that often reaches beyond the bounds of the organisation.”

Databases are limited in scope.

“Databases generally provide structured information such as names, photos, titles, brief job descriptions, previous work experience and contact information,” says Rumizen. “Unstructured information can include a person’s likes and dislikes or anything else a person feels relevant. However, the data is limited due to the time it takes an employee to enter the information; and, at best an employee profile cannot cover the sum total of someone’s experience and expertise, or match it to the unknown problems that may drive a future question. Compounding the problem, keeping such an inadequate database up to date is near impossible.”

Databases are supply driven. “While stories that illustrate miraculous connections abound,” Rumizen says, “I’d prefer to focus on the types of knowledge needed and how best to provide it. For example, in a consulting firm, knowledge, documentation and contacts for previous projects are critical. What knowledge is needed on a routine basis? What knowledge would provide a high payoff? What knowledge is most critical to the organisation’s key capabilities and strategy? Perhaps the best way to provide that knowledge is through multiple strategies to include communities of practice, project databases and other ways to link expertise.”

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In *Knowing What We Know: Knowledge Creation and Sharing Within Social Networks*, Rob Cross, Andrew Parker, Laurence Prusak and Stephen P. Borgatti found that, despite easy access to a world-class knowledge-management system and other accessible information sources, 85 per cent of the managers in the study reported using personal networks, not databases, for obtaining the information that had an impact on the success of a given project. Four attributes of these personal relationships were found that promote effective learning:

- Knowing another person’s expertise and thus when to turn to them;

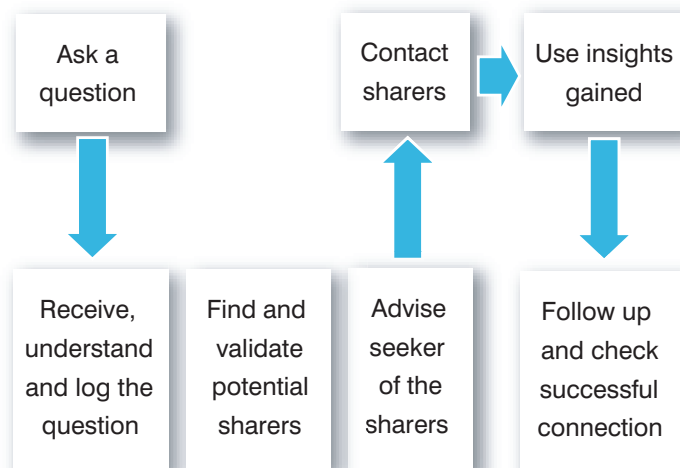
- A degree of safety in the relationship that promotes learning and creativity.

The Lend Lease situation

Lend Lease never bought software. Nor did it develop its own version of a yellow-pages-style database. But it knew it had to find an alternative.

When Lend Lease first recognised it had a knowledge-management problem, the company was a leading real-estate-services business, with a business portfolio covering project management, construction development and management services for commercial accounts that had been developed over nearly 50 years.

Like most problem-solving companies, Lend Lease had several document depositories, in which content quickly went out of date:



The ikonnect process flow (for a more detailed version, visit www.kwork.org/locators.html)

▶ people were not submitting new content and preferred to use their own networks to uncover the latest knowledge rather than download the documents. Many of the authors of the original documents were leaving the company and it was difficult to find new owners responsible for managing it. Frustrations with these issues, and a

third said, ‘We have a guy in Taiwan who has just spent six months working on this exact topic; why don’t you give him a call and discuss your needs before we do anything?’ Once I had his name, I spent 30 minutes on the phone with him and learnt all I needed to know. After that I thought, we don’t need databases; we just need a

companies, providing project-management and construction-services worldwide. In addition, other companies provide a variety of diverse services on a regional basis. For example, in the Asia Pacific region, Delfin Lend Lease focuses on the development of large, integrated residential communities, incorporating retail, residential, office,

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knowledge-seeking experience by Lend Lease Asia Pacific CEO Ross Taylor, led to the big idea.

“I was looking to engage a management consultancy to help me with a key piece of work on the microelectronics industry,” Taylor recalls. “I invited three leading management consultancies to prepare a proposal. Two came back with two-inch thick proposals, but the

service that facilitates exactly what I have just done.”

This revelation led to the formation of the ikonnect service, at a time when Lend Lease had grown into a diverse, complex and widely distributed enterprise.

Today Lend Lease is a network of companies operating in 40 countries. Bovis Lend Lease is the largest of the

infrastructure and community facilities. In Europe, the major focus is on a number of sectors, including hospitals, the defence sector and urban regeneration. In the US, Actus Lend Lease develops military homes and communities for the Department of Defense.

The genesis

“When we were developing the concept of ikonnect, we looked high and wide and did not find much published on facilitated expertise systems,” explains Cullen, who now acts as facilitator for Lend Lease’s Asia Pacific region. “We did look very closely at the product supplied by AskMe, but felt the system lacked some of the key elements we felt were needed for success, particularly human facilitators.”

In 2001, a six-month pilot was launched in Bovis Lend Lease to establish whether the concept had credibility. A group of 150 senior managers worldwide and one facilitator in each of the three regions were chosen for the test. If the pilot project could earn support from this management group, the CEO reasoned, the rest of the company’s employees would buy in.

“We developed the service and the tools as we worked to answer questions,” Cullen recalls. The quality and quantity of questions handled during the test period, and the support shown by the group of managers, led the CEO

Sharer becomes seeker

The ikonnect team uses a ‘request for knowledge’ (RFK) system when it is faced with a needle-in-a-haystack problem. RFKs are distributed by e-mail to all employees in Lend Lease, and usually contain a small fraction of the questions received in a typical week.

A senior consultant with Bovis Lend Lease, the largest subsidiary company in the Lend Lease family, opened up an e-mail containing an ikonnect RFK. With 30 years’ experience on all three continents, he assumed there would be a question he could help with.

One of the questions was about a particular brand of door imported from Italy. It aroused his interest because he was in the middle of reviewing a design for client KPMG’s Sydney office that included a specification for the same brand door. He contacted the Asia Pacific ikonnect facilitator to see what the question was about. He learned that the seeker had experienced a problem with these doors in the past and that the manufacturer was proving to be obstinate in repairing the faulty doors.

Alarm bells went off in the potential sharer’s head, and he advised his client of the issue. A representative of KPMG called a meeting with the architect demanding that the door supplier be changed.

As the consultant involved says, “ikonnect is not just useful, it is essential. There is a wealth of knowledge and experience in the company that is accessible through the system. It’s rapidly becoming one of the tools of our trade, and the more people use it, the better it will become.”

to commit funds for the service to expand to the rest of Bovis, and ultimately to the rest of Lend Lease.

Today, all Lend Lease employees and many of the employees of Lend Lease clients are involved in the system. There are four full-time, and one part-time, facilitators. To date, more than 3,000 users have logged 12,000 questions and answers, and a limitless supply of success stories.

The process

The best way to understand the process involved is to follow the flow chart, pictured, or the more detailed chart available at www.kwork.org/locators.html.

Rather than attempt to capture all organisational knowledge in a single database, the ikonnect system starts on the other end, ie, with a question, an approach that bypasses the impossible scope of collecting data in search of a question, and starts with the question itself before progressing through a set of organised steps. What follows is a simplified summary.

Ask a question. Seekers start the process by asking a question (called a 'seek') either by e-mail or through a phone call to a facilitator. A question may also be submitted online, but ikonnect encourages direct one-to-one communication from the start. To ensure that people ask questions, Lend Lease uses every communications medium available, including an orientation for new hires that includes an activity called the ikonnect Name Game.

"Most people think their personal networks are better than they really are," Cullen says. The Name Game was inspired by Malcolm Gladwell's *The Tipping Point*, and is intended to help people understand the limitations of their own networks and compare them to the power of ikonnect's Lend Lease-wide network. The results are self evident and thus very effective, according to Cullen.

Receive the question. If the seek is received in person (via a phone call), the facilitator works with the seeker to

Fire dampening snowball effect

In Australia, a Bovis Lend Lease director sought the help of two experienced construction-industry colleagues, who together had 50 years' experience, to assist with an initiative involving recurring defects that had plagued clients.

One problem involved fire dampers, which are provided inside ductwork to automatically block off airflow when temperatures indicate the presence of a fire, thereby blocking off distribution of dangerous smoke inside the ductwork. The problem was that fire dampers must be installed properly and inspected routinely to ensure they continue to function.

The seekers decided to search for an alternative to this approach, and contacted ikonnect to ask about other methods used elsewhere around the globe. A sharer in the New York office provided several alternatives, including information on a product developed by 3M called FireMaster Duct, which is a fire-resisting fabric. The product was not available in Australia and thus was not known about by the seekers. The seekers followed up with the manufacturer and discovered the manufacturer had considered exporting it to Australia, but didn't think there was any demand. Clearly the seekers were about to change that.

Meanwhile, another employee of Bovis Lend Lease in Sydney was about to send out a tender package he had prepared to replace A\$850,000-worth of fire dampers for a project in Sydney. He had heard of ikonnect, having used it for another question only two weeks earlier, and decided to contact ikonnect to see if anyone had any knowledge about fire dampers. Ironically, he knew the other seeker and had passed him in the corridor that very morning.

He learnt from ikonnect about the original seeker's recent discovery and quickly contacted him. Through a series of connections, an official of the Commonwealth Science and Industrial Research Organisation, who had authority to grant dispensation to the Australian Standard, visited the site involved and agreed that, owing to the use of the new product, the dampers would not need replacing at all, which reduced the cost of the work by A\$500,000.

fully understand their seek. If not (if the question is submitted via e-mail, for instance), their seek is acknowledged within two hours and the facilitator will probably contact the seeker in order to discuss their precise needs.

"The actual question is usually completely different to the original question submitted by the person," Cullen says. Why? "Because once we understand the context of the question, it can nearly always be made broader or narrower to better meet the real needs of the person asking."

If it's a new user, the facilitator also captures the user's information. If the user has used the system before, the

facilitator only needs to record the details of the seek.

Find sharers. During the four years that ikonnect has been active, a substantial collection of seeks, shares and success stories have accumulated and been distributed across the three regions. Facilitators, therefore, have both personal knowledge and tools available to help them find the right sharer. In addition, they use databases, phone lists and organisational charts. Most importantly, it is the facilitator – not the seeker – who is making the cold calls to potential sharers.

When these avenues don't produce a sharer, the facilitator can seek help from facilitators in other regions or use

▶ a regional ‘request for knowledge’ to put out a general appeal to everyone in the organisation. If the search for a sharer fails, the facilitator advises the seeker that sharers were not found. Even this is valuable to Lend Lease, as the seeker could be a future sharer on that subject and the seeker now knows to stop looking internally and engage a consultant to assist. If sharers are found, the facilitator continues to do the seeker’s legwork.

Validate sharers. Just as the facilitator works to understand the question, they are also responsible for validating the sharer to verify that the sharer does have the experience and knowledge to assist the seeker, is available, and is willing to receive and respond to a

phone call or e-mail from the seeker. If it’s a new sharer, the person’s name and

A similar discussion is held with the sharer about the seeker.

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profile are entered into the facilitator’s database. In either event, the details of the case are added to the sharer’s file.

Arrange the connection. Once the sharer or sharers have been validated, the facilitator passes information along to the seeker, including insights about the sharer.

Seeker makes contact. It then becomes the seeker’s responsibility to contact the knowledge sharer. This two-way interaction is where a significant exchange of knowledge occurs, as it uses a question-and-answer dialogue that experience has shown provides deeper understanding than a simple document transfer, as occurs with document databases. Note: the maximum amount of time that has elapsed at this stage of the process is seven days.

Resolve and capture. Facilitators follow up to learn whether contact was made, to gather insights from the seeker and the sharer, and to use those insights to rate the sharer for future reference. The facilitator resolves any remaining issues and closes the case.

But the work is not done. If the case is a particularly good story, the facilitator follows up with the seeker for a quote and details about the results of the share. Stories are published on the Lend Lease intranet, the Hive, and are used in the ikonnect newsletter to build further credibility for the programme. Like most KM programmes, an ongoing healthy communications plan is fundamental to the sustainability of the service.

ikonnect the differentiator

A LARGE construction and renovation programme resulting from a court-mandated response to a state supreme court ruling required upgrades to inner-city schools facilities throughout the state of New Jersey, US. One phase of the project was a \$300-million programme spanning three years. The largest construction-management companies in the country were competing for the contract.

Bovis Lend Lease, which already had a significant reputation in the area of school construction, was in the third and final round for the largest phase of the project. Bovis was competing against six other contractors and it was struggling to identify a clear differentiator in its proposal, since in reality, Bovis was like most of its competitors in the way it conducts business on large projects.

During the closing minutes of the presentation, two questions were asked by one of the selection committee members: ‘How can Bovis Lend Lease draw on lessons-learned experience from the previous phase in order not to re-invent the wheel on the next phase?’; and, ‘Does Bovis have any way to interact from one project team to another?’

One of the Bovis presenters described the ikonnect system and explained how the service was available to all staff globally to solve problems using previous experiences. Other presenters were able to produce ikonnect reminder cards from their wallets. They were passed around to the committee members, who were intrigued. The presentation was extended for an extra ten minutes.

Needless to say, Bovis won the contract. ikonnect was a major factor, and Bovis now includes ikonnect as a source of differentiation on all of its client proposals.

“We were recently awarded another major project,” one of the original presenters says, “largely because of the owner’s fascination with our ikonnect programme. It was a major differentiator. The client could not learn enough about the fantastic depth of resources, information and benchmarking capability represented by ikonnect.”

Determining the value added

Having heard Cullen’s story, Rumizen was impressed, but her original question centred on the point that she had never found anyone who could tell her what real value an expertise locator had delivered, ie, cost compared to benefit. As in many knowledge-management initiatives, giving a definitive answer was not easy.

“I am assuming that you mean a hard-dollar return, where there is a

statement that we spent X dollars on our expertise-location system and it provided a Y dollars return,” Cullen responded. But he stressed that ikonnect was different from a software-based expertise-location system because:

- ikonnect is demand driven and only stores knowledge obtained in the process of answering questions. ikonnect doesn't create knowledge supply by creating pre-populated people profiles or yellow pages; rather, it uses dedicated people who know who is who to put people in touch with those who can help;
- The ikonnect goal is to change employees' collective behaviour so that they naturally want to ask questions. Ikonnect achieves this by maximising the probability that they get a valuable answer to their questions. Ultimately, this helps to make Lend Lease more competitive as it stimulates innovation and increases existing knowledge re-use, thus enhancing efficiency by minimising knowledge re-invention.

According to these principles, the system has provided useful answers to more than 12,000 questions from its employees by putting them in touch with other employees who are willing to share their knowledge. All of these questions and answers have been logged by the facilitators, so that they can better make connections in the future.

This data also allows ikonnect staff to show usage trends and growth in networks through SNA tools. Surveys have been run that clearly indicate the ikonnect service has delivered value in excess of cost. There are many stories where someone used ikonnect and saved the company, or its clients, amounts of up to \$500,000 (see sidebar, 'Fire dampening snowball effect').

“However,” Cullen concedes, “we have yet to crack the Holy Grail, we-spent-X-but-delivered-Y value

Busting bureaucracies

A Lend Lease associate contacted the ikonnect team when she needed some help identifying the right person at Australia Post to assist with obtaining a red posting box for Delfin Lend Lease's Nelsons Ridge project in Sydney.

The ikonnect team used the RFK approach to find an answer. A colleague in Delfin Lend Lease Queensland responded to the RFK with information about a contact in Queensland. The ikonnect team got in touch with the contact, who in turn identified the correct person to talk to in New South Wales (NSW). The seeker was able to directly contact the right person in Australia Post, NSW who could assist in the process of installing the mailbox at Nelson's Ridge.

“I am pleased with the prompt response the ikonnect RFK generated,” the seeker says. “It enabled me to work through what would normally have been a time-consuming process in half the time, achieving what will be a great outcome for the new community at Nelsons Ridge.” The seeker also says that Australia Post's structure took “a bit of investigating” to find the first contact in Queensland, and now the contacts and the processes are on the ikonnect system for anyone else in the company to search. “The ikonnect service makes it so much easier to pick the brains of colleagues in other regions and share valuable information,” she says. “Perhaps the ikonnect team can help you bust through your bureaucracy.”

statement, and we are probably never going to be able to do so.” If you save time, it doesn't necessarily save money – as readers will be aware from their own work experiences, time has a way of getting filled by some other activity. And, Cullen says, “In a service-based business, there are too many inputs that go into creating an output. Proving a causal link between one particular input like ikonnect and an output is impossible.”

There appears to be no doubt in the Lend Lease management suite, though, that ikonnect has solved the problem Taylor originally recognised. In a company that has cut over 20 per cent from the overheads of its several subsidiary companies in the past three years, the ikonnect programme has continued to receive increased funding from senior managers. Regardless of the lack of hard evidence, it is obvious that the ikonnect service is seen to be providing added value.

Many companies have spent large sums on data-based expertise-locator

systems – on the software, the data input and the staff involved – on the understanding that it is critical for knowledge-based enterprises to know what they know and what their employees know. But if truth be told, all such attempts have resulted in only limited returns or even failure, because data-based systems to date have only ever been supply driven and fail to take into account organisational or individual needs. Lend Lease has pioneered an alternative too innovative to be ignored. ■

To engage in a conversation with Garry Cullen and Melissie Rumizgen on expertise-locator technology and the Lend Lease ikonnect experience, join the Association of Knowledgework at www.kwork.org/explain_join.html, and get ready for a two-week e-mail and online STAR Series Dialogue in July.

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