



A Business Social Software Platform

*Requirements and issues for supporting informal learning and
knowledge transfer within the enterprise*

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Introduction

Today, all organizations run on knowledge as they uncover the most opportunities and derive the most value from their intellectual rather than physical assets.¹ Businesses and governments are well aware that their ability to capture, organize and disseminate knowledge is a critical component of their overall performance.²

Everyday, employees need immediate access to information to complete their jobs. Whether trying to drive a sale forward, troubleshoot a problem, install and repair equipment, comply with a new policy, answer a constituent's question or perform any of the other hundreds of necessary tasks, employee productivity – and success – depends on the individual's ability to gain timely access to accurate information.

But knowledge is no longer static or exclusively maintained in structured documents, making it more difficult for organizations to capture and codify useful information just once. In every function, from HR to IT, customer service, engineering, field service, education, sales, finance and so forth, organizations face:

- Constantly changing customer, regulatory, product, service and competitive requirements
- Continuously changing strategies and priorities, best practices and business relationships
- Constant and sudden exceptions to business processes and rules
- Loss of employees through retirement or job changes that result in lost organizational and “tribal” knowledge

The quantity and rapid rate of change knowledge makes it difficult– if not impossible – for most workers to know everything they need to know to perform their jobs efficiently and effectively. At best, today's knowledge workers may have access to a number of relevant knowledge assets and be aware of a few experts that can supply them with necessary knowledge. However, they continue to face great difficulty finding the most relevant knowledge or expert at the exact moment when critical expertise is needed to get the job done.

Why Traditional Knowledge Management Does Not Meet Today's Knowledge Needs

To cope with growing knowledge needs, some organizations started to develop Knowledge Management (KM) strategies and implemented KM solutions to help them manage knowledge. However traditional solutions for KM have serious drawbacks that have failed to increase the availability, reliability and completeness of knowledge as follows:

- Many KM solutions require specialized tools to contribute and manage knowledge. Knowledge contribution becomes limited to a few experts or knowledge engineers, creating a knowledge bottleneck that cannot keep up with the fluid, rapid pace of today's business environment.
- There is no easy way for knowledge workers to contribute easily to the implementation, and contribution requires special effort beyond workers' normal workflow. This extra effort is especially problematic as workloads increase, and workers struggle to keep up with their everyday tasks.



- Accessing the KM system is often difficult and cumbersome, which discourages use.
- There is limited to no ability to capture and re-use “tribal” knowledge as it is created.
- KM implementations are often colossal and span the entire organization with no clear goal beyond gathering and maintaining all knowledge about everything.

As a result, typical KM solutions have not delivered the expected results. They simply do not meet the needs of employees who face rapid and constant change, and who must continuously expand their skills and expertise in order to remain productive.

Business Social Software Delivers a Practical Solution

Business social software offers a distinctly different approach to the ways in which knowledge is contributed, organized, disseminated and re-used. Because information needs change so fast, business social software treats knowledge expansion and sharing as an *on-going business behavior* that is woven into the fabric of everyday operations. To ensure the continuing relevancy, accuracy and completeness of knowledge, business social software enables information to be constantly captured and used without requiring employees to step outside their jobs.

Solutions for business social software overcome the limitations of traditional KM by taking advantage of everyday tools, such as email, Microsoft® Word, PowerPoint and Excel, to facilitate knowledge contribution and collaboration. Business social software reflects the fluid nature of knowledge generation today, which takes place at the grass-roots level through highly interactive, informal, even “viral” interactions. By making it as easy as possible for employees to participate, business social software embeds knowledge collection and dissemination into employees’ everyday activities. At the same time, it focuses on helping employees complete specific tasks with targeted, just-in-time knowledge.

Knowledge Area	Traditional KM	Business Social Software
Knowledge acquisition	Few “experts” only	All knowledge workers
Organizational scope	Within organization only	Business-initiative ecosystem, including internal and external participants (e.g. employees, partners, customers)
Knowledge interaction	Top down, knowledge “pushed”	Just-in-time, organic “pull”
Knowledge content	Structured, rigid	All forms of knowledge, flexible, ad-hoc
Knowledge contribution	Periodic, fixed	Real time, grass roots, as discovered & required
Knowledge customers	Employees only	All participants, internal & external
Collaboration	Synchronous via meetings	Asynchronous
Expertise exchange	Knowledge shared one-to-one; not captured for wider re-use	Multi-directional; knowledge captured for wider re-use



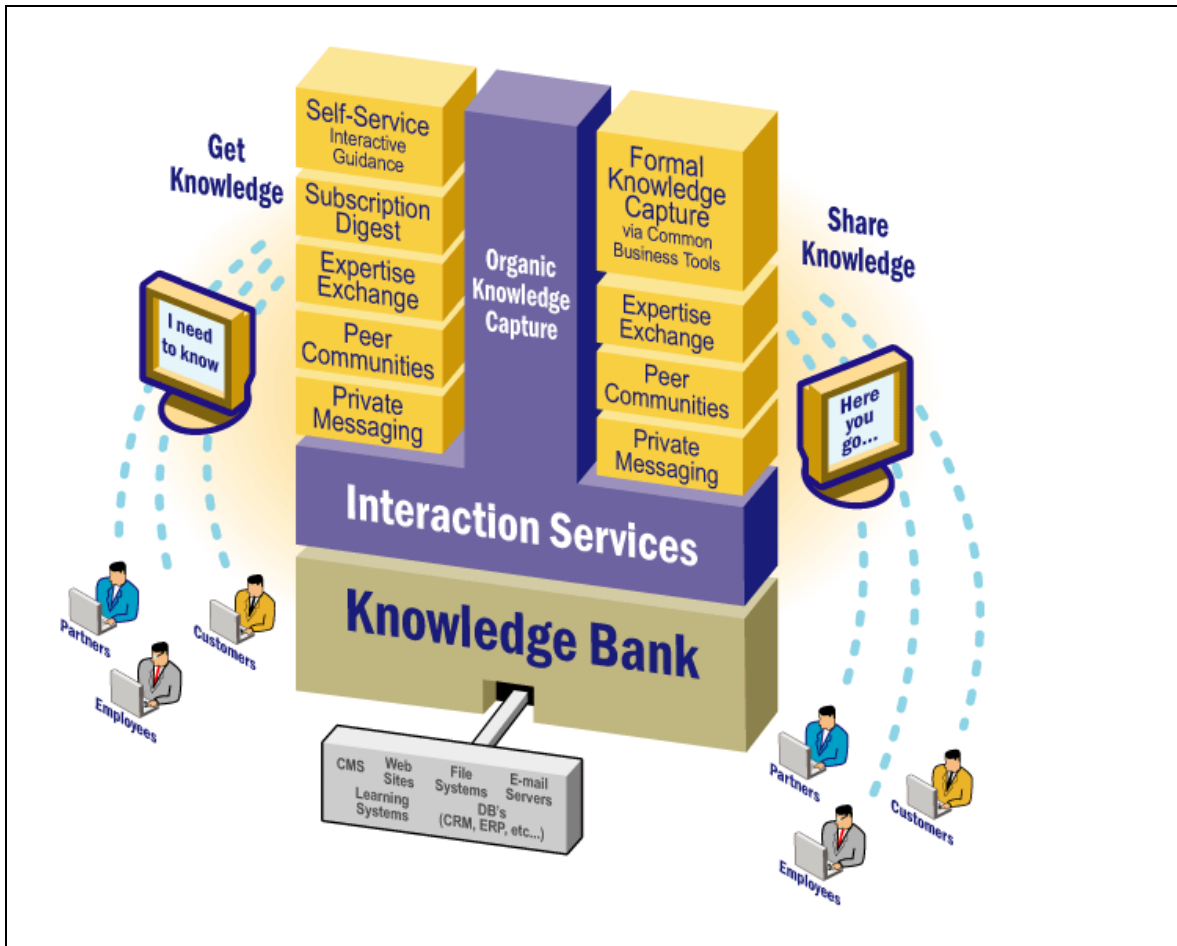
Effective business social software solutions enable this level of organic and fluid knowledge capture and use through the following:

- **Collaboration with peers and experts.** Much of the most valuable information is shared informally in organizations. And, unfortunately, most of this high-value knowledge is promptly lost. Online peer and expert communities solve this problem by facilitating the free-flow of ad-hoc information and then capturing the knowledge so that it can be re-used by others. Communities use familiar business communication methods for ad-hoc knowledge sharing. Through managed peer-to-peer and peer-to-expert email exchanges, online discussion forums, Wikis, and on-the-fly expert events, communities ensure an orderly flow of information exchange and capture.
- **Expertise exchange.** Because the knowledge of subject matter experts (SMEs) is crucial to an organization's ability to be effective, business social software enables easy identification of and interactions with SMEs. Expertise exchange can automate the process of finding the right expert for specific subjects. Because it is integrated with standard office tools, interactions with the expert become a natural extension of employees' day-to-day activities. The interaction is captured and made available to others when they need it. To avoid overwhelming experts with a constant barrage of questions, expertise exchange manages these interactions by automating the process for routing an inquiry to the most appropriate SME, controlling the volume of questions to each expert, equally distributing workload and establishing service levels to track requests and escalate them appropriately. In addition, as responses are automatically captured and made available to others seeking similar knowledge, productivity increases since SMEs no longer have to answer similar questions multiple times.
- **Private messaging.** Private messaging facilitates and captures knowledge exchanges between individuals without sharing the information beyond the participants in the conversation. Useful for mentoring and conversations between peers, managers and individuals, private messaging maintains the exchanges for later re-use and discussion only by the individuals involved in the original exchange.
- **Knowledge contribution by all.** Business social software recognizes knowledge contribution as a grass-roots effort in which all members of an organization are users and potential contributors. This broad, continuous knowledge generation demands contribution methods that do not require employees to learn another application or stop their work to contribute. Business social software addresses this need by using standard business tools including Microsoft Word, PowerPoint, Outlook, Excel and Wikis for knowledge contribution within the context of each employee's daily activities. The quality of content is then managed through a rules-driven workflow that automatically routes contributions through a review and approval process. Because contributing is as simple as "Save As" from a desktop tool, "Send to" from an email, or creating a Wiki entry, organizations can dramatically improve the timeliness and completeness of knowledge without disrupting the normal flow of daily activities.
- **Organic knowledge capture.** Business social software enables organic knowledge acquisition by fully integrating a knowledge bank with online communities, expertise exchange and private messaging. By automatically



capturing all the knowledge contributed during these ad-hoc interactions, business social software expands knowledge capture, sharing and re-use without special processes and tools. As a result, the knowledge bank grows organically to become a comprehensive knowledge resource that offers access to a complete range of useful information from formal learning materials to experiential exchanges and tribal content.

- **Knowledge bank.** The knowledge bank serves as the central hub for accessing all these types of knowledge. As a virtual repository, the knowledge bank is designed to integrate with existing enterprise systems so that corporate knowledge can be quickly accessed and used without needing to physically move or replicate the content. This allows access to structured knowledge and even information contained within portals and Web sites to quickly create a strong base of knowledge. For efficient access, the knowledge bank intelligently guides users, helping them find the most relevant information as well as providing immediate access to communities, expertise exchange and private messaging when knowledge is not yet captured.



Business social software provides highly flexible ways to capture, manage and disseminate knowledge that reflect the grass-roots, organic nature of knowledge development and use in today's organizations.



Let's look at some of examples of how these business social software capabilities can be used across the organization.

Department	Process	Using Business Social Software to Improve the Process
HR	Rollout of LMS/Talent Management System	<ul style="list-style-type: none"> ▪ Formal training is delivered by LMS to all employees. ▪ As employees go through the formal training modules, they share their experiential knowledge by collaborating via communities or contributing via Wikis so knowledge is available to all. ▪ Expertise exchange is used by ISDs and SMEs to answer employee questions. Results are captured and made available to all employees. ▪ Private messaging can be used to mentor employees or enable sensitive questions to be asked and answered. ▪ Support for rollout can be provided through business social software. (See Call Center/Help desk example below.)
Call Center/ Help Desk	Customer inquiry resolution	<ul style="list-style-type: none"> ▪ Support representatives use intelligent guidance in knowledge bank to locate answers to customer questions. ▪ If there are SCORM training modules available, and the answer is within these modules, support representatives can use it to answer the customer's question. ▪ Answers stored in knowledge bank have been routed through review and approval to vet the accuracy of the knowledge and ensure best practices. ▪ Support representatives use peer-to-peer and expert exchange to tap into tribal knowledge. ▪ Support representatives contribute new knowledge as they answer customers' questions using standard tools. ▪ Automatically distributed bulletins alert representatives to important changes and new information.
Field Service	Day-to-day activities	<ul style="list-style-type: none"> ▪ While at a customer site, field service representatives may have issues. They use wireless devices to query the knowledge bank for answers and best practices, and use the expertise exchange to quickly get answers from experts if the information cannot be found in the knowledge bank. The knowledge is captured and made available to others who may run into the same issue. ▪ Discussion forums are used to share best practices, tips and tricks that are captured and become part of knowledge bank.
Sales	New product launch	<ul style="list-style-type: none"> ▪ SMEs use standard tools to contribute to the knowledge bank. ▪ Experts are made available through expertise exchange. ▪ SMEs set up knowledge communities for subjects that they feel are important to share. ▪ Sales uses communities to collaborate and share their experiences and best practices as a part of roll out. ▪ Sales uses expertise exchange to interact with SMEs. New knowledge is then captured organically and made available to all on an as-needed basis. ▪ While at a prospect, sales executive sends a prospect's question via a wireless device to the knowledge bank or the expertise exchange, enabling him or her to immediately respond to the prospect. ▪ If there are any training modules (in SCORM format) available, and the answer is within these modules, sales executives can use it to answer the customer's question. ▪ The experiences captured help management and SMEs identify knowledge gaps that need to be addressed. ▪ The knowledge captured is useful to future new hires.



Department	Process	Using Business Social Software to Improve the Process
IT Help Desk	Application rollouts	<ul style="list-style-type: none"> ▪ An expert forum is used to introduce application across organization. ▪ Discussion forums capture tips and tricks, and users subscribe to weekly bulletins of complied tips. ▪ IT provides on-going “Ask an Expert” availability and organically compiles questions and answers in an FAQ available in the knowledge bank. ▪ All IT support issues are handled through the knowledge bank which, in time, decrease IT help desk workload.
Training & Development	New course development	<ul style="list-style-type: none"> ▪ Geographically disbursed ISDs and SMEs use peer-to-peer communities to collaborate on content development. ▪ Expertise exchange captures interactions between ISDs and SMEs and decreases the dependency on SMEs over time. ▪ All standards and best-practice documents are stored in the knowledge bank and are available to all.

The Value of Informal Learning and Knowledge Transfer

By increasing relevant information access, improving collaboration and knowledge sharing and retaining organizational knowledge, business social software can have a dramatic impact on knowledge workers including the ability to:

- Increase productivity and effectiveness by providing employees with just-in-time access to knowledge as they perform a task.
- Capture the knowledge of experts to spread expertise and best practices throughout the organization.
- Protect organizational knowledge as workers change jobs or retire.
- Improve the performance of a distributed workforce by overcoming organizational and geographical barriers to information flow.
- Enhance sales performance by sharing experiential strategies, tips and tricks throughout the sales cycle.
- Bring products to market faster by encouraging the free-flow of ideas and innovations and organically capturing the suggestions.
- Improve customer service by reducing resolution time while increasing the consistency and accuracy of answers.
- Increase employee retention rates by recognizing the value of employees' knowledge and rewarding them for it.
- Lower operational costs by reducing the time spent searching for information and the inconsistent application of best practices.



Successfully Implementing Business social software

Implementing business social software does not require a massive commitment of time, resources and capital expenditure. The following guidelines demonstrate how business social software can be quickly and successfully implemented.

Start with a manageable initiative. Implementation does not have to be a complex, “big bang” project. In fact, greater value can be achieved by beginning with a small, discrete initiative. By starting this way, you can easily define the goals and measurement metrics for business social software, quickly demonstrate value, and then build on those successes to spread business social software to other high-payback areas. A good place to start is with a project which can easily be justified based on simple logic and back-of-the-envelope ROI, such as:

- A Learning/Talent Management initiative
- Capturing expertise from your retiring workforce
- Customer-facing initiatives, such as supporting the sales team or call center around a new product launch or a new organizational initiative
- Supporting an enterprise system rollout

Turn SMEs who will benefit into initiative advocates. In any organization, an SME is often the go-to person for expertise and advice. If SMEs are supportive of the initiative, they can see how it benefits them by increasing their productivity, reducing their frustration by eliminating the need to answer the same question repeatedly and providing a platform that allows them to proactively contribute their knowledge, then it is much easier to convince others of the value of business social software solution and much easier to prove the results.

Choose a platform solution. Successfully implementing a business social software strategy may seem as simple as deploying a centralized database, electronic forum or message board, a Wiki, Web portal or any other collaborative tool. However, this “stovepipe” approach will only create islands of knowledge that cannot be tied together, resulting in wasted expenditure and, ultimately, a failed implementation.

Because business social software requires the different forms of knowledge creation, maintenance and access to work together seamlessly, a far wiser solution is to use a platform that encompasses and integrates the different knowledge channels so that information can flow between them without obstruction.

Consider starting with a hosted model for your first initiative. Hosted models offer a highly cost-effective alternative to purchasing the hardware and software needed to support business social software, especially for a first initiative. In addition, your organization benefits from the expertise of the provider, who has developed best-practice methodologies for the planning, implementation and on-going maintenance of a business social software environment.



Conclusion

The ability to contribute, capture and disseminate knowledge will continue to grow in importance as organizations rely on knowledge workers expertise to keep the wheels of government and business rolling.

Business social software successfully reflects the real-world knowledge requirements of the modern organization. With business social software, organizations can successfully align knowledge capture, maintenance and dissemination with the needs of their employees, enabling them to respond effectively to changes in policies, best practices, products and services across all business processes. Business social software also mitigates the negative effects of losing employees with simple, familiar methods for capturing high-value tribal knowledge embedded into everyday activities.

With business social software, organizations can successfully overcome the limitations of traditional knowledge management to enhance the efficiency and effectiveness of every employee, improve sales performance, increase the quality of customer service, bring new products and services to market faster and reduce operational costs.

OutStart offers a business social software platform to substantially increase the effectiveness and efficiency of today's knowledge workers. OutStart business social software:

- Provides central knowledge access through an intuitive knowledge bank that reduces the time it takes to find needed knowledge.
- Enables quick knowledge expansion using standard business tools to create and contribute content.
- Easily locates and facilitates exchanges with peers and SMEs.
- Captures knowledge organically without changing the way people work.
- Provides a strong track record of implementing effective, best-practice business social software solutions with proven value to OutStart customers.
- Offers multiple choices for deployment ranging from perpetual license, hosted solution and Software-as-a Service that gives customers the choices they need to successfully deploy a business social software initiative.

For More Information

For more information about the OutStart portfolio of solutions, please visit www.outstart.com

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¹ CIO: <http://www.cio.com/research/knowledge/edit/kmabcs.html#what>

² Learning and Beyond: Leveraging Organization Knowledge for Better Business Results. Aberdeen Group, November 2005.