Getting Management Buy-in for KM

A narrative exercise 2006-7

Patrick Lambe

Objectives

Straits Knowledge
Redefining corporate knowledge

- To collect a wide variety of stories from the experience of KM practitioners about success and failure in getting management buy-in for KM initiatives - both senior and operational management

- To build a set of archetypes that characterise values, attitudes and behaviours that knowledge managers frequently encounter in their management colleagues

- To help knowledge managers identify the types of message that might be most effective for different types of colleague

Process

- Story collection via web, online forums and conferences/workshops in Canberra, Perth, Hong Kong and Singapore

- Stories about success and failure in getting management buy-in

- Four archetype extraction workshops in Canberra, Perth, Hong Kong and Singapore Oct-Dec 2006

- Similar archetypes clustered together into master set and drawn by artist

- Published at actKM Conference Oct 2007

Workshop Agenda

- Introduce the project so far, the process used and the archetypes
- Activity: index the archetypes for motivators and values
- Briefing: A Model for Change Communications
- Activity: Communication strategies for key archetypes

Workshop Detail

- Introduce the process and the archetypes
- Ask groups to share their own experiences relating to any of the archetypes - to establish where there is resonance with the archetypes build some of their own context around them and build common ground in the groups
- Ask groups to identify the motivating and demotivating factors for each archetype (use post-its to tag the archetypes pasted on the wall)
- Introduce the change communications model
- Ask each group to adopt one archetype and design a change message for them using the five questions of the change communications model

Eric is a manager who can see no farther than the current task or priority. He's reactive and indecisive, preferring circumstances outside his control to take the blame for any adverse consequences. He's a poor manager, pushing paper better than pushing activity. He delegates risky responsibilities quickly, without support or supervision. Because he's so risk-averse and cannot think strategically, he is particularly keen on "quick wins" in a knowledge management initiative. If you can promise him a result today, he might give you some verbal support, but he will not commit to working with you for longer term gains. His lack of confidence is hidden beneath a fondness for jargon and he bandies the technical vocabulary of KM around inaccurately, but with apparent fluency.

3 sub-archetypes Archie Wanker, Ned the Nerd, Eric the Sceptic

Eric the Sceptic

Motivated by:

Being listened to
Appealing to his ego
Addressing his concerns
Actively promoting quick wins for possible further engagement
Praise and acknowledgement of achievements

Demotivated by:

Risky prospects

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Eric the Sceptic

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Junior Jo

Junior Jo could be one of your management liaisons or he could be on your KM team. He's a management trainee, a recent graduate with little working experience. This means he has no baggage, but it also means he's ill-prepared for the complexity of a KM initiative. He gets easily overwhelmed by the complexity of his task and by the typically evolving nature of KM, and he compensates by taking a fixed position and stubbornly sticking by it. He has insufficient experience to be able to spot emerging trouble until it's too late. In consequence, the more experienced managers refuse to take him seriously, so if you're relying on him to get their buy-in and support, or to keep track of your KM progress, he's likely to lead you into deep trouble, as poor alignment between the business and KM never gets picked up until it's too late.

2 sub-archetypes: Blur Sotong, Junior Jo

Motivated by:

Providing a mentor eg Ms Smile
Feeling able to ask a lot of questions
Providing opportunities for learning or understanding
Reassurance
Give regular tasks and set expectations
Clear direction
Providing training in the job
Small short projects
Giving him something concrete to do

Demotivated by:

Challenging his viewpoint and assumptions
Creating more work with low value
Anything complex

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Junior Jo

Freddy is a fairly senior manager, sometimes a Vice President. He's full of his own experience and wisdom, and every interaction is one where he tells you what he thinks you need to know. He's domineering, belligerent and controlling. His sense of superiority is belied by his lack of true insight or strategic vision. He sticks to the "tried and true" method of bean counting, will only focus on anything that can be put into a spreadsheet or a calculator. Ask him to think about intangibles and he'll give you a lecture on accountability (which you suspect he confuses with accountancy). No matter how hard you try he wont come out of his comfort zone. But even if he did agree with you, he wouldn't be much use, because he forgot how to do real work a long time ago, and he wouldn't have any idea about how to follow through with real support.

2 sub-archetypes: Blind Freddy, Tan Ah Kok

Blind Freddy

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Motivated by:

Small short term wins
Short projects
Results
Make him think it's his idea
Provide an opportunity to exert control, veto or approve
Project makes him look good without him having to do much
Quick win proposals
Use facts

Demotivated by:

Complex plans
Complication & Complexity

Blind Freddy

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Betty is on your KM team, maybe even leads it. She's actually relatively young, but looks much older than her years. She's been technically trained in information management, library science, or records management, but unfortunately her studies did not prepare her for the complexity of actually doing that stuff inside a real organisation. She doesn't really have the social or communication skills that she needs to get support and buy-in from her colleagues, so she retreats into her workstation issuing documents and plans that nobody takes seriously. This depresses her and makes her cynical and sour about her employers - which is a great shame, because she came into the job with a lot of energy and enthusiasm and bright ideas. Now she gets stressed very easily, and is constantly scanning the employment ads for another job, not realising that she'll carry the same problems with her wherever she goes.

Betty Blue

1 sub-archetype: Betty Blue

Motivated by:

Valuing her contribution
Giving her something to do
Validation of technical skills and experience
Involving her in a team project with clear role
Giving her a communication resource
Ideas are listened to
Encouragement and praise

Demotivated by:

Others not getting the technical stuff and not caring

Betty Blue

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Katie is the longstanding corporate librarian or records manager who has been catapulted into responsibility for this strange new beast, knowledge management. Everybody assumes that she's perfectly equipped and qualified for the task, but the truth is she's never had to engage with the messy and fragmentary world of knowledge and information use in the operations, and the primary users of her systems have been seen as clients who have to fit her systems and processes. Now it's the other way round, and she has to get to grips with the shape of their work and day to day changing needs. What's more, she doesn't really understand the technology implications for widespread knowledge management. She's not good at handling tough decisions or managing conflicting views, either. So however willing and friendly and service oriented she may be, she just can't seem to make any headway.

Katie Kindly

1 sub-archetype: Katie Kindly

Motivated by:

Giving her a project with clear parameters
Hiring a consultant to work with her
Collaborative decision making
Service for people she likes
Recognition, gratitude for her work
Being assigned as champion for reporting
Encouragement and handholding
Listening to her achievements
Seconding her to the field for a few months

Demotivated by:

Demands and pressure to change/perform/deliver
Fear and panic

Katie Kindly

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Dr Fiona could be one of your KM team (if you're really, really lucky), she could be a KM sponsor, or she could simply be one of the pro-KM managers in your organisation. She's in her thirties, sharp, smart and completely up to date. She "gets" KM and a collaboration because that's how she naturally works. She's a great networker and communicator, and she's also very thorough and effective as a manager. This gets her a lot of respect and authority, so if you get her on your side, things will go much easier. Her decision making style is to be firm and clear, and she believes in following through and not giving up half way. Some people can see her as aggressive and ambitious, because of her heavy focus on results. However, she can be flexible as well, and can be very resourceful and creative when things get tough.

3 sub-archetypes: Miss Green, Dr Fiona "Julie Andrews" Wood, Visionary Joe

Dr Fiona

Motivated by:

Just about everything – highly resilient personality
Recognition of work
Acknowledging her contribution
Team benefits
Seeing progress
Providing opportunities to innovate
Results
Energy
Collaborative initiatives

Demotivated by:

Not being consulted
Roadblocks
Being undervalued
Being openly opposed
Disempowerment
Distraction from goals

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Dr Fiona

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Captain KM is the ideal CKO or Head of Learning and Development. She has the big picture view and the drive to reach for big things, but is also very pragmatic and resourceful. She guides her team on a practical level and champions KM at a corporate level, even when there is strong opposition. Once she has set a direction, she will follow through regardless of obstacles, but she makes sure that she is fully briefed on all the facts before she makes any big decisions. If it is necessary to take risks she will do so, but she is also very politically aware, so she will choose her moments to make a strategic move, so she won't necessarily act when you want her to! She is quite visionary and can paint a picture of what she wants to achieve that is easy to understand and buy into.

3 sub-archetypes: KM Crusader, Captain KM, Mr Smart

Captain KM

Motivated by:

Vision, strong leadership
Being in tune politically
Having solutions
Challenges where she can have a say
Involved in decision-making

Demotivated by:

Criticisms behind her back
Micromanagement
Whingers and complainers
Politically inadvisable projects
Structures that stand in the way
Highlighting the risks she takes

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Captain KM

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Mr Money is a hard-nosed, results-focused senior manager. It may not be easy to persuade him of the benefits of knowledge management, but he's not afraid of taking a risk and investing in big visions or taking a long term view, so long as he can see the potential value for the business. So once he's on your side, he will supply the resources you need to get things done. However he will also hold you accountable, and expect you to achieve your goals at clear intervals. Mr Money is also prone to other big ideas, and will always be seeking to make connections between KM and his latest big idea, or to get results faster than planned, so you'll sometimes have to work hard to keep your KM initiative on track at an operational level, and prevent it from being hijacked in new directions.

3 sub-archetypes: Mr Money, Richard Branson, Papa Smurf

Mr Money

Motivated by:

Results
Being presented with a good project plan and itemized budget
Responsibility and accountability
A good clear business proposition
People close to senior management, strategic management teams
The competition is doing it
The value proposition for the enterprise

De-motivated by:

Too many tasks
Suggest their idea is not good
People who don't keep promises
"Political" decisions by the organization

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Mr Money

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Stale Dale

Stale Dale is a middle manager who stopped thinking or really caring about anything except himself a long time ago. He sees tenure in his job as a hard earned right that should not involve any extra work, and therefore doesn't see the point of changing the way things are done or of collaborating with anybody else. He's really just focused on his retirement in a few years time so there isn't any scope for appealing to visions of a better future. Because he combines stagnation with autocratic behaviour, his entire department behaves like he does. If you try and persuade him or them of the benefits of KM, they'll be negative, cynical and dismissive. They just won't see the benefits you're describing, and they won't understand why you are even bothering to try. Dale is too cautious to come out and oppose you openly however, he'll simply wear you down with negativity.

5 sub-archetypes: Stale Dale, Ignorant Fool, Harry Whodidn't, Stubborn Taurus, Mr Static

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Motivated by:

Reinforcing his ego
Making it seem like no extra work
Giving him control
Acknowledging his achievements
Listening to him

Demotivated by:

Having to be involved in a group decision making process
Doing work for the good of all, rather than of direct benefit to them
Any form of openness or democracy

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Stale Dale

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Wally is a middle manager who is, let's face it, just incompetent. He's been promoted way past his level of ability, he's disorganised, a poor communicator, easily manipulated by his staff and has no real feel for the ground. Nobody really respects him, but because of his position you (and others) still have to go through him. His lack of competence makes him insecure and suspicious, and unwilling to take responsibility for new things. He conceals this by always being "too busy" to pay any real attention to you, and he flits from one important meeting to another asking random questions to make him appear to be more on the ball than he really is. So it's very very difficult to get a decision out of him, or any insight into the business needs of his department But at the same time he won't give you access to the people who might be able to help you.

Clueless Wally

2 sub-archetypes: Clueless Wally, Unskilled Manager

Motivated by:

Flattery
Maintaining status and power
Increased status
Recognition of his contribution
however minimal
Making him look good

Demotivated by:

Accountability

Clueless Wally

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Getting Management Buy-in Archetypes - Straits Knowledge 2006-7

Ms Smile could be any staff member who instinctively "gets" the need to share and collaborate. She makes a great KM champion at the operational level, and an influential team member on KM projects. This is because she's full of energy, friendly, a good communicator, and a good networker with her colleagues. She's liked and respected, and although the more cynical ones might think she's a bit too soft, they'll still cooperate with her, because they know she'll help them back. She's not just a good networker and KM evangelist however - she believes in getting results, and has a good eye for detail, so she'll make sure the KM project stays tuned to the business needs. If it seems to be going in the wrong direction, or is producing negative feedback from her colleagues, she will tactfully let you know and suggest a solution.

2 sub-archetypes: Ms Smile, Shal

Ms Smile

Motivated by:

Encouragement
Recognition for a good job
Lifting whole organization
Increased social connections
Celebration of achievement/ success

Demotivated by:

Negativity and cynicism
Isolation from others
Lack of recognition of contribution/ effort

Ms Smile

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Mr Eager is a younger member of staff who's come into your organisation full of energy and bounce. He's up for any challenge, and willingly takes on the collaborative approach encouraged by knowledge management. However his more cynical colleagues might make fun of him for being too naive, or take advantage of him and simply dump the responsibility for KM activities on him. As time goes on he becomes the dumping ground for doing the leg work on other organisational change initiatives as well. He doesn't have enough experience to know when to stop taking on too much, or the credibility to be able to influence his colleagues in any substantial way, even though they generally like him. He runs the risk of taking on so much responsibility that he gets overloaded and burnt out.

1 sub-archetype:Mr Eager

Mr Eager

Motivated by:

Anything new
Skills training
Prioritizing and regularly renewing tasks and activities

Demotivated by:

Having to say no
Being ignored
Job being taken away from him
Motivated by allocated
Use for clerical grunt work
No recognition or praise

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Mr Eager

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Mr Moody has built a formidable defence against being asked to do more than his fair share (as he defines it) - and that's his bad mood. He sits at his workstation and glumly goes about his tasks. Nobody wants to work with him, and he resents having to work with others, so he builds his job into a self-determined, self-contained little silo of activity. You can preach knowledge sharing all you want, but he's completely self-sufficient, and just doesn't get why anyone should want access to his information. He is certainly not interested in what anyone else has to offer. Try and persuade him, and you'll be repelled by his glassy glare. Use your authority, and he'll reluctantly agree, but will go back and do what he's always done. Because he's been working on his own for so long, you won't even be able to get visibility into what he could or should share. His supervisors tolerate him because they don't want to risk losing him - his defensive isolation has ensured that only he knows how to do his job.   **1 sub-archetype: Mr Moody**

Mr Moody

Motivated by:

His project area supervised by Mr Money
Praise and recognition of his work
Showing how his work benefits the organisation through examples
Creating opportunities for passing on knowledge through mentoring or supervision of staff
Listening to him/her
Empowerment/authority, giving responsibility

De-motivated by:

Visitors/Conversation
Reduction in Role
Change
Tight supervision

Mr Moody

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Dirk Demtel is an ex-army officer who retired in his mid-30s to pursue a new career in knowledge management consulting. He has a double degree in business management and marketing. He likes a lavish lifestyle, dresses beautifully, and drives a sports car. He believes in pushing himself and others beyond the pain barrier, and frequently advocates this in his consulting engagements. "Don't take no for an answer!" he preaches to his clients, and somehow they all believe in his message. Get him to sell KM to your senior management, and he can do it without a problem. While he's with you, he's inspirational, but his energy and sense of clarity and direction may leave when he leaves, if you don't manage to graft it onto your internal KM team and sponsors. He's like a drug, and that's partly the point - so you'll ask him back. But is your dependency a healthy one?

Dirk Demtel

1 sub-archetype: Dirk Demtel

Motivated by:

Striking while the iron is hot
Leaving a legacy
Making him the face of KM on the website
Clever ideas
Feeling of superiority
Motivating other team members

Demotivated by:

Long term commitment
Anything down to earth or pragmatic

Dirk Demtel

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FREQUENCY OF ARCHETYPES ACROSS FIVE GROUPS

5 groups

3 groups

3 groups

3 groups

3 groups

2 groups

1 group

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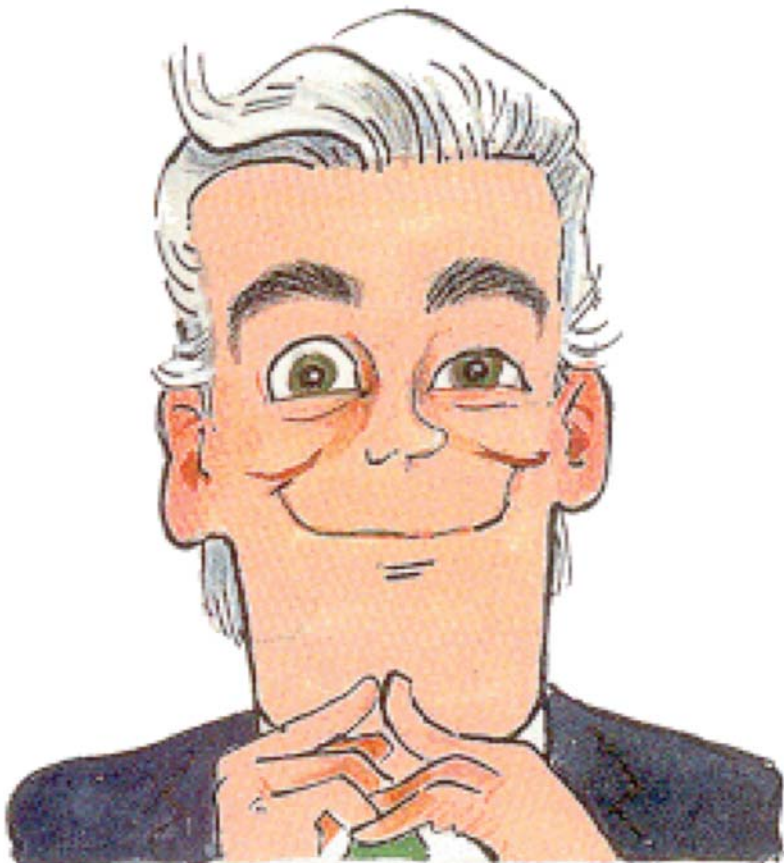
Communicating for Change
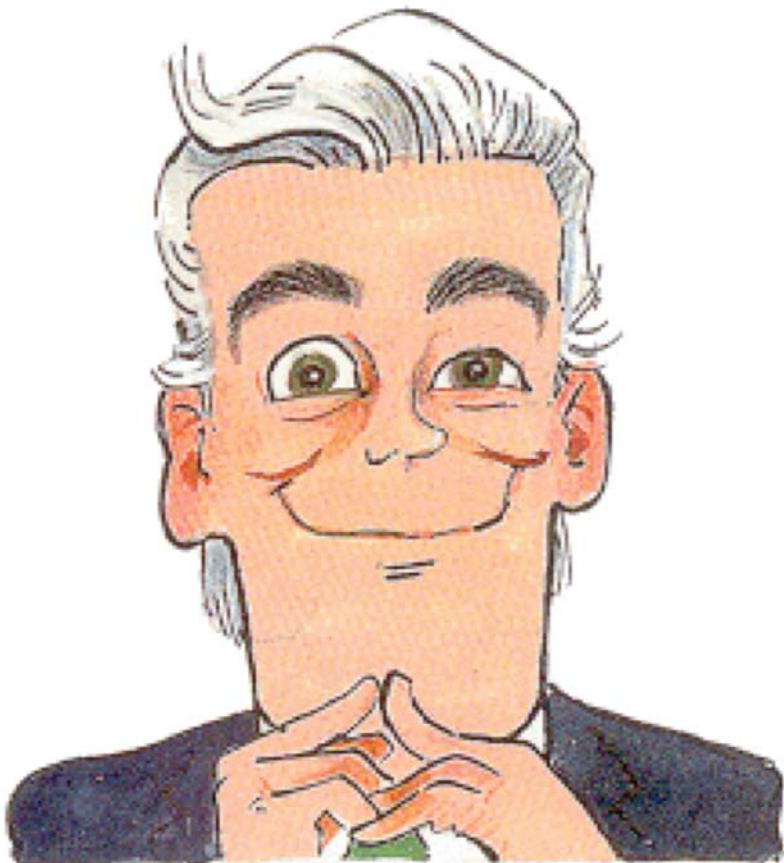
Five key questions that people usually THINK when asked to make a change - from research into questions asked at corporate town hall meetings

Source: Bill Jensen, *Simplicity* (2001)

Communicating for Change

1. How is this relevant to me and my work?
2. What, specifically do you want me to do?
3. What are the consequences?
4. What tools and resources are available?
5. WIIFM?

Communicating for Change

Try to frame your communication to answer the questions in the mind of your specific audience

We'd like to thank the actKM Forum, SIKM Leader's Forum, AOK Forum, and the many individual contributors to this project.

Patrick Lambe

plambe@straitsknowledge.com

Straits Knowledge 2007

www.straitsknowledge.com

www.greenchameleon.com

Getting Management Buy-in

84 Anecdotes collected from KM practitioners June-November 2006

An engineering firm I worked for had a number of management-initiated communities of practice that were languishing and I was trying to secure funding for travel that would enable establishment of relationships to build the sense of 'community' needed for the groups to develop. This required a business case which I worked on for several months: it didn't' convince either management or me of the 'value' of either the groups or the required travel.

Changing tack, I started seeking out and testing stories where the communities had benefited the company or its clients. I would bump into the Managing Director in the hall and test the stories: "Hi Pete, did you hear…..". His eyes would reveal the impact, so I kept trying till his eyes lit up and he said "I need this story put in my weekly newsletter, this is exactly the sort of example of delighting the client we need".

The written version of the story went like this:
"Late in the afternoon of Monday 4 Nov 04, [name] was asked by his client if he knew what was happening regarding risk management software within the client's [very large] organisation. [name] posted a question to the Project Management domain (a community of practice) – 'Does anyone know what will replace the client's current RM software?'
• Replies from three senior staff were received within 10 minutes concluding that there while there was no formal decision to replace the current software, it was likely that the [new software] application would be introduced at sometime in the future. By the following morning, [name] could update his client on the latest available information. He was also able to advise the client that our firm had already conducted a review of the [new software] application.
• [name]'s client was delighted at the accuracy of the information and [name]'s responsiveness. A business opportunity had also been created.
• To follow-up, on 11 Jan 05 another domain member posted a link that strongly indicated [new software] being phased in over the next 24 months. Ten minutes later, yet another domain member posted a message that he had just come from a meeting that had confirmed that [new software] was to become the client's standard tool.

This example demonstrates that the firm has the ability to comprehend many details of the client's business and to quickly extract and share that knowledge. All members of the domain now know something about the client business that most in the client's organisation do not. Combined with the firm's experience in conducting an evaluation of [new software] for the client, this provides us with a significant competitive advantage. We knew more about the client's business than the client did."

So, while I would love to say that the MD immediately approved the business case for travel for the domain teams, this wasn't the outcome. But there was a major change in the MD's attitude towards the domains. It went from 'tolerating their existence' to seeing clearly how they could and were adding value to the business. I then continued to look for and test other stories…

I know I've got buy-in when someone senior starts telling we need to do something (set up a community, run a lessons learned exercise) that I told them we needed to do 6 months previously and they think its their own idea.

When I worked for a consulting firm, I would continually ask a senior stakeholder (let's call him "Luke") if we could do some lessons learned work with particular project teams. Luke was an ex-accountant, a big, gruff man who in some lights resembled a bulldozer. Luke would listen for a while and then cut in: "Look, we don't want to bother the project teams with this". As far as Luke was concerned, he was glad that Knowledge Management was going on in the background provided he didn't have to be involved with it. Then one day he called me into his office and said, "You know about xxx large project? Well, the team there is doing some bloody good stuff that the rest of the world needs to know about. Do you think you can interview those people involved to extract what the key lessons might be?"

If I had to identify some stereotypes of stakeholders, I would suggest:
- The Dream Leader: Knows as much as you about KM. Has respect over their reports & peers so can open doors for you. Pushes you to do new & innovative things. Proactively reaches out to you.
- The Opponent: Views KM as a complete waste of time & you as a nuisance at best.
- The Obsessive: Has a pet hobby horse (a piece of technology or method) they want you to push - whether it's appropriate or not.
- The Hand Washer: Make all the right noises but do nothing themselves and do not hold their own people to account for milestones in KM project.

I was a very senior technology strategist in the corporate IT function. My immediate managers instigated research into the needs for technology support for KM in the corporation. They were very responsive and understanding of the need for corporate level business engagement to define needs and context before we got into the technology. Over a period of years we tried to get the necessary engagement but always failed. Two examples:

One example, a meeting with the Corporate CIO, Two department CIOs, the GM Infrastructure, my boss - the Chief Architect, and myself. Discussed examples of business unit engagement with the KM value proposition, discussed IT's role, discussed how KM could address some of IT's strategic issues. Result: a number of agreements focusing on broadening the discussion with the business and within IT. Real result: zero follow up.

Another example, there was a corporate steering group for the Intranet that would have been a good basis for some corporate level KM support. During 2002 individual lobbying of members resulted in a presentation and discussion of the value and potential of KM. Committee decided that it wasn't something they could take on but that chair of group (a direct report to the Company Secretary, I think) was to table this issue in senior leadership meetings. Sounded promising but again the real result was zero follow up.

P.S. I left XXXXXX in 2003. During 2004 & 2005 the technology group tried to tackle KM by introducing a firm wide knowledge portal. This included financial reward for contributions. It was shut down earlier this year

A more positive story this time. And one that is still unfolding…

I've been with UrbisJHD for a tad under two years now. The decision to join was a tough one… stay in my own one-man band consultancy… or become a salaried worker once again. One of the important factors in my decision was that I was being hired by the managing director of our company and he had a passion and vision for what knowledge management means to the business.

Since joining, I've found that virtually none of the other directors understand or care about KM and most of what they wanted me for initially was in face information management. It's been a slow process but I finally feel that we've got good engagement and increasing commitment. Some of the things that made a difference:

• Building my reputation by delivering on the important information management items they care about.
• Talking about the difference between IM and KM where ever possible.
• Various presentations to various groups of staff.
• Showing the director's that I care about their money.
• The MD setting "becoming a truly knowledge based organisation" at number 3 of 7 strategic objectives.
• Individual meetings with directors to talk about what I can do for their business unit.
• Visioning exercise at a recent director's conference considering what value it would have to "become a truly knowledge based firm" and what it take to get there.
• Creating and selling (individually) a KM business plan that helps the company take the steps the director's seem read to take.

Where I could improve this engagement process is to ground my discussion more in stories and examples that the director's and other staff can relate to.

I teach I and KM at Canberra Institute to mostly mature students in the workforce. This semester as part of a new marking regime, I put in the 3 minute lift speech (for you Americans this is the elevator speech)…. they had 3 mins to convince a senior executive, boss etc of what was needed in knowledge or IM in their organisation.

Well the students did really well. The class agreed that hearing every one's story was really good, working on making it short was really good and they were all going to have a crack at it in real life.

Best story was about by one woman who works in an area that makes specialised defence hardware with special software. She told her boss (in her speech) what, why when and where it was important to their organisation, then as a practical exercise, that they should film some really difficult technical work with the specialist talking it through with some more junior techos.

Well not only did she do well with her marks she then did the talk to her boss, then did the filming, and everyone came down to watch and reckoned it was a great way to move some of their stuff forward as senior techos look at leaving the organisation. The moral of this story is that the essence will be slightly different for everyone and you do need to work on that, but getting lots of ideas always helps.

Here's a follow-up to this story. Some weeks ago, I mentioned a student of mine who had used a lift speech to convince her boss that they needed to do something about the loss of a very significant engineer, (and interestingly not to age retirement, as usual, but a Gen Y who decided after having $30K spent on his training that he wanted to travel the world - note to managers, they are leaving faster than the boomers or should I say not staying.). Some of you contacted me about how it all went. In more detail.

Well the filming was done with a couple of engineers asking questions as part of the process, however they also had an engineer who had the manual in front of him. First page, taking off the cover of the piece of kit, and they found the kit didn't match the manual! Thus after 2 plus hours they had a revised manual, and a video film both of which have gone on the shelf. The company is in the process of doing this with every piece of kit that they supply to the DoD. The output will be a revised manual and a video for whoever wants to use them.

Another result of this was the boss asked my Student if she had any more of these bright ideas from her class and she said she had a report full, so that has gone to him as well. Good outcome for her, the company, and I can tell you I feel pretty chuffed as well.

I have not asked our executives what they think KM is because they would say that's what they employ me to advise them on.

However, in selling KM concepts to them we use this set of bullet points.... (to engage their logical and data oriented left brain. "This makes sense")

• Get the most out of what we have globally
• Understand what we have that can be leveraged
• Align programs (requiring better Knowledge management practices) with global strategies
• Build active networks and communities of practice
• Build and facilitate a collaborative culture
• Focus on some specific projects with tangible benefits
• Demonstrate benefits to build confidence and reduce resistance to change

and this phrase..... (to engage their emotional & intuitive right brain "I like the sound of that")

Imagine when.....

CS S&T personnel have a very good understanding of what knowledge, capabilities and expertise we have across our global businesses
We exercise agile processes that quickly bring together the right teams to address development needs and innovation requirements
Everyone knows how to quickly access the people they need to assist them, they are confident that their request for help will be positively addressed and they trust what their professional networks deliver for them.
.... morale is up, creativity and innovation are maximised and value generation is booming.

We adjust the Science and Technology KM strategy each year to align it to overall business goals and reflect what activities we are doing within the team. We build upon the foundation from previous years, so there is continuity in the program as a whole (even though the specific focus shifts each year).

This year's "KM strategy" summary statement is "S&T feels and operates as a single globally connected team"
We have 3 focus areas under which all projects are structured: Connect, Collaborate, Capitalise. It is focused on building knowledge sharing behaviours. Short, sharp, easy to remember and most importantly linked to key business functions and outcomes.

Yesterday, our global CEO made a business update presentation here in Australia and specifically mentioned the value of the knowledge sharing work we have been doing. Before these statements were pushed up through the hierarchy, I am sure he was completely unaware of any programs we had running (let alone who I am). Words work, if presented right for the audience

Here's a story about an organisation I know, where half way through a KM project, the senior manager who was sponsoring the project moved on to another job elsewhere.

The new appointee came in from outside, and wanted to re-examine everything from scratch. The KM project was halted, and everybody had to go back to ground zero to build a rationale, do all the senior management convincing, build a new framework, etc etc etc. As far as I know, the original project is dead in the water, I'm sure they are doing something now, I suspect that it's very technology focused.

It does seem to be a common thing in organisations here, that new leaders feel the need to "pee on all the trees" marked up by their predecessor. Or is this a male thing?

In one project we've worked on, the main challenge was to get the attention and time of senior managers. The project required some fairly significant decisions on the degree of cross-organisation harmonisation of practice and policy, and decisions could only be made at this level.

However, the organisation was undergoing a lot of internal change, including management and structure changes, and this just didn't appear high enough on their list of priorities - as far as they were concerned, they'd delegated the KM effort to a project team and they should just get on with it.

The result, very slow progress, difficulty in getting the time of middle managers too (because no clear mandate coming through from above), and a final smaller scale set of proposals that were within the power of the project team to implement. Lots of the identified needs and opportunities were left unmet.

This may seem contrary to the title, but I hope it helps. First I ask the question why do you need management buy-in? This is only necessary when 'management' has the power and resources, but there are many CoPs that work without 'management'. In addition as an executive manager in one company I worked in, I gave my department workers the power to meet and exchange knowledge, initially at monthly meetings. This may seem simplistic but the power of regular meetings for knowledge exchange, particularly when the people were normally in separate projects and buildings, was enormous. The rebuilt team that came from this found these meetings so useful that when I left they ignored a new 'manager' who thought the meetings were a waste of time, and continued to meet until he joined them. So stop thinking in terms of ALWAYS needing management buy-in and think instead about how as a team you can achieve what you need.

Here's something Graeme Simsion (http://www.simsion.com/) presented at the 1996 DAMA conference in Canberra. Sure, it's aimed at data managers, but the parallels are so frighteningly close that I'm sure that you can work out the applicability to KM...

Data Management - The Big Picture

The three biggest issues are not too different from 15 years ago. They are:
- Getting Management Support
- Defining What We Do (Reinventing DM)
- Staying Employed (What's In It For Me?)

Getting Management Support

Understand what management wants. That's the key.

Usually, we only _think_ we know what they want, or (more likely) think we know what they need.

What they want:
a. Support for their pet projects (initiatives tied to their real goals)
b. Help with _identified_ problems
c. Understanding, sure - but _action_, too
d. Projects with deliverables
e. Short-term results
f. Measurable (and measured) outcomes
g. Bite-sized ideas (not because they are dumb, simply so they can cope)
h. Focus more on revenue creation than cost containment.

Just _listen_. Listen a _lot_. Use empathy. One day, you'll find somewhere you can help.

What they don't want:
a. Prophets of Doom
"The sky will fall in, if you don't do xyz..."
People remember PoD's, especially when they are proven wrong.
b. Salespeople (except their own, of course)
c. Zealots ("unreasonable men")
d. Children with hammers (everything is a nail)
e. Missing the big issues (the 300kg gorilla)
f. Infrastructure (= ongoing cost)
g. Abstractions and diagrams they don't really understand
(they hate being intimidated into making a decision)
h. Simplistic models of management behaviour
(especially of decision-making)
i. Simplistic models, period
(e.g. tell them data => information => knowledge => wisdom and they'll laugh at you)
j. Insight (they don't want mere insight, they want results!)

Guess what? Sometimes, people simply don't want to share data. (The horror!!! The horror!!!)

2. Defining What We Do (Reinventing DM)

The traditional model led people to make unachievable promises. It also encountered heavy opposition and inevitably led to failure.

The game has changed! We must fit into the organisation's business model.
For example, right now there's too much data for a centralised group to manage - we have to change styles.

(Note that the most important factor in DM success is a charismatic leader. The thing doesn't work in its own right - it needs a salesman.)

Have a focussed view. Ask the following:
- where is the pain in the organisation?
- how much are you willing to pay to get it fixed?
then…
- do whatever it takes to _get_ it fixed.

Key changes from the traditional approach:
- philosophic sell ==> hard benefits
- policy ==> projects
- global solutions ==> Pareto's Principle (80/20)
- telling ==> listening

And here's the kicker: "Which single DM initiative would deliver the greatest value to your CEO over the next 12 months?"
(And if you're not doing it, WHY NOT???)

What should a DM group do? Co-ordinate? Provide economies of scale? Provide specific skills?
Try narrowing the focus - if someone else can provide it, why are we doing it?

Instead, define a niche:
a. Broad perspective: Where are the big hits, generically?
b. Local perspective: What is wanted, _here and now_?
c. Professional perspective: What are we good at? What objectives require that expertise?

3. Staying Employed (What's In It For Me?)

[Here, Grahame talked about the elevator spiel. His idea was to tell the boss that we are like architects for houses, except we do it for databases. And for heavens sake, don't say you're "creating the universal discourse of the organisation", he'll think you're nuts. And he'd be close to the truth. 🤭🤭]

Finally, Graeme gave a workload filter to use for a few days:
1. Who Wants This - and how badly?
2. Theory, or Evidence?
3. Is the DM team the best place for this?
4. Is this what I want to do?
5. Where's the best place to do it?

Acknowledgement: please remember that these are not **my** ideas, they are from **Graeme Simsion**. Go on, buy his book (http://www.simsion.com/dme.htm). You Know You Want To.

Obtaining buy-in from my company on KM is definitely the most difficult challenge I came across in all my career, because it is not so much a question of resistance to change than a question of lack of awareness of the dramatic changes occurring in the business world as a result of demographic changes, globalization and the Internet. Developing CoPs, obtaining the MAKE award, creating powerful knowledge fairs… all of this has been done in my company with real success, and yet I still fight the huge gap between the advocated strategy, which is in favor of KM, and the "real" strategy, which is still very much driven by the industrial age.

I sometimes wonder if we are not missing the point. The KM revolution (or Renaissance) is happening under our eyes. Just look at how teenagers and young adults communicate across the globe. When the time comes for them to enter the job market - now as a matter of fact - they will shun the dinosaurs of the industrial age and join post-industrial age companies, or they will join the dinosaurs and start implementing change from the ground up in an underground mode.

If the colossus has clay feet anyway, I wonder if telling him is such a smart thing to do.

This is a story of initial success capped by ultimate failure and perhaps indicates the risk that KM initiatives face in certain circumstances.

Some five years ago now, we were engaged by a major metropolitan transportation provider in the UK to undertake a number of small KM infrastructure development pilot projects. The company had discrete funding for its KM development programme and two enthusiastic full-time staff - one a senior engineer who had been with the company for decades - dedicated to driving the KM development programme forward. The projects were undertaken sporadically over a period of about two years.

The pilot projects included a major effort to develop an expertise directory. This was developed initially for one of the ten directorates in the company and proved very successful, such that a year later, we were engaged to conduct an extensive consultation programme in all of the remaining directorates with a view to extending the directory to include the whole company. Another pilot project involved knowledge mapping with a view to establishing a methodology for mapping competence profiles onto specific business activities to facilitate workforce planning. A third pilot project examined the major communities of practice and interest in the organization, both formal and informal, including those which extended outside the organization to include parties from similar companies worldwide. The aim was to improve how lessons were learned. This project then analyzed how these communities were supported and how they communicated, and recommended ways of capturing and re-visiting lessons learned, which included both procedural and cultural elements and technological support.

When the pilot projects were completed, they were generally regarded as being very successful and provision was made in the ongoing KM programme to roll them out across the whole organization. At that point however, the company (whose majority shareholding was publicly owned) was made a subsidiary of the larger cross-platform transportation authority for the city. This body had no discrete KM programme and immediately scrapped the smaller company's KM programme and withdrew funding. The leader of the KM programme was made redundant soon after.

As far as I know, the company still has no KM development programme as such, although various technology-based initiatives are proceeding, such as EDRM. As external service providers we were OK - we got paid. But it was painful to see an enthusiastic KM team with a number of successful initiatives under their belt simply snuffed out by a 'higher' authority which simply didn't see the value it was throwing away.

The moral? Well, I suppose it is that it's all very well to have buy-in for KM at the top of your organization, but if there's a change of management at the top, or you're subject to an M&A exercise, where executives ignorant of the imperative for KM move in, then all the ground you've gained so far can simply fall into an abyss.

Pushing a <acronym title="Knowledge Management">KM</acronym> solution, or being a change agent for any solution within one's company (or pushing for it as a consultant) requires one to think critically about the culture of the organization.

I've discussed ([here](#) and [here [PDF-288 KB]](#) the issue in detail (as it related to some government agencies), but I think there are two basic ways to get buy-in:

1. **Top-down** - State your case to corporate leadership. Do an analysis to determine the <acronym title="Return on Investment">ROI</acronym>, emphasizing that human resources and the knowledge they possess is just as valuable as the company's other resources. Better yet, conduct a competitive analysis to show how a competing company leverages <acronym title="Knowledge Management">KM</acronym> solutions.

2. **Bottom-up** - If you cannot sell it to the top, see if you can embark on a smaller-scale endeavor. Get a small group of people who already buy-in to the solution and then sell the need like a virus. For instance, I work at a small company (<500 employees) and there is no intranet presence. I find that sometimes the very information we are looking for is right next door to us in someone else's head, but we simply have no clue! As a result, I am working to introduce a wiki and blog, coupled with newsfeeds using the del.cio.us bookmark tool so that my small team of 5 can better share our knowledge and easily access it as needed. Right now this solution uses free hosted tools and our team is experimenting with these tools to see how they can best help our needs. Once this is going for a while, then perhaps we'll do a roadshow throughout the company to show how this helps our team and how it might be able to help the enterprise - both **intra**departmentally and **inter**departmentally.

In 1996 I bought my first book on knowledge management it was Nonaka and Takeuchi's *The Knowledge Creating Company*. I remember being blown away by the idea of systematically harnessing knowledge in an organisation. At the time I was working for a consulting company and had organised monthly breakfast forums and suggested we talk about knowledge management at the next session. I presented the ideas from *The Knowledge Creating Company* and at the end of the session the branch manager (who eventually became the CEO) dismissively quipped as we walked out of the session, "stop wasting your time on these peripheral activities and focus on the main game." I protested at which the manager said: "well it seems to me that what we know at the moment is only as good as a book review." Ouch!

Here's an example where we had too much management buy-in, not just for KM in general, but for Taxonomies in particular.

A very senior manager in the organisation who was a true KM convert, understood it very well, decided to become a "taxonomy evangelist". He had us communicate taxonomy theory to audiences that had no idea why we were spouting this stuff, and it took excruciatingly long to plough through the theory and into the practice of what this meant for them. He would come into a meeting and say, "I want every manager here to submit a proposal for how they can use the corporate taxonomy in their everyday activity in their departments, not counting the portal".

Of course, when we realised what was going on (glazed eyes, supremely bored participants), we tried to tune our messages to the audiences, and what they needed to know about taxonomies and how it fitted into their work and their responsibilities. But it was still overkill.

This also happens with selling "KM" too, and I am still trying to figure out the balance between education and simply letting the audiences know what is expected of them and why it's relevant, without using the official jargon at all.

Once upon a time, in a galaxy far, far away, there was talk of a new organisation, that would provide citizens of this planet, with a one stop shop for any government services that these citizens might need.

As the new organisation came into being and as part of how this organisation needed to provide this service, it became obvious that the use of information was going to be critical to the new organisation. So this someone, lets call them Merlynne, had a long think about where the information was in the organisation, how people used the information and it seemed that none of this stuff: the information people connection, was working very well.

Now Merlynne prepared a short, hopefully powerful talk and asked to speak to the CEO and DCEO of this new organisation and explained, that over the next few years a lot of people would leave the organisation because of their age (now too old to cut it in the cut and thrust), and some would leave because they did not want to be part of the new organisation, and some would leave because their skill sets were not needed any more. Merlynne explained that previously in another organisation 15.000 people had left the organisation as it had transformed into a commercial organisation and 15.000 brains had taken their knowledge and walked out of the door.

Merlynne was given a mandate to start work on sorting out these information and knowledge issues. She was also given some people and some money. Over the next 6 months she beavered away at doing some things to sort out where things where, how they were being used etc. But she also asked one of her staff to do some serious research on the KM and IM space so that she could present a more detailed view of what might be possible in the future and what that might mean for the organisation.

When the research paper was ready, she booked up the CEO and the DCEO and the head of the People Team, telling them they needed to understand what could happen if this went ahead. Then they were taken through all the conceptual stuff around KM and connected this back to the services agency and its business. After 2 hours no one had spoken, at this point Merlynne was feeling pretty fragile and thinking it had gone very poorly. A couple of questions and another half an hour went by. At that point the managers stood up said 'best piece of original research done by someone in government' and yes this was where they wanted to go.

Lots of other positive things happened to move this forward and this is what Merlynne learned:

· Be sure of what the business really wants to do, (special lesson - often they are not very sure, and need help working it out)
· Deliver, Deliver, Deliver, (on anything that has been requested)
· Explain, Explain, Explain, (anything and everything to anyone who asks),
· Keep Executive in the loop, make time to chat about wins, stalls and where you need them to show an active and noticeable interest,
· Badge things, so that they are seen to be part of the exercise,
· Keep your Champions bubbling, they keep the story going,
· Support the Knowledge team staff as they struggle with the non-believers
· Be involved in any and all special projects because they will pull the knowledge work processes through,
· Be on every high level committee in the place, as this is the lobby space, again activities out of these pull through knowledge exercises.
· Sometimes magic dust really helps (we always kept a pinch at hand)

Here's a story told me today: big KM implementation (IT infrastructure and information management and collaboration, quite complex) project being run by a well established (4-5 years old) KM department ... organisation suddenly gets restructured, the KM team is disbanded, dispersed to different departments, and the KM project handed over to corporate affairs dept, who have none of the history, context, specialist knowledge... there's a project where apparent management buy-in (organisational structure, budgets, well-defined large projects) appears to have evaporated overnight.

I joined Org A when they set up their KM Dept. Prior to the setting up for the Dept, there was a KM initiative (portal) that was undertaken by the IT Dept which was deemed a failure. When I joined, there were 4 of us in the Dept - a boss who only had an IT background, me with about 5 years of KM experience with a MNC and 2 staff with Librarianship background.

My previous President was very gung-ho about KM because in his previous company was big on KM (one of the big 4 accounting firms) so he thought it would be great here. He insisted that a Lotus Notes system be put in place and had visions of Intellectual Capital initiatives.

I don't know what when wrong but by the time I joined, most of the Senior Management was pretty sceptical about KM. I'm wondering whether it could have been due to the previous failure (IT's Portal) or perhaps my boss? He wasn't much of a communicator and seemed to always rub people the wrong way. This became worse when got a new President because he had no idea what KM was.

As a result, every time we presented a list of initiatives to Management (we needed to get their approval before we could proceed with anything because most of our initiatives involved culture change i.e. sessions with staff, etc so we needed Management to give approval so that the Heads of Departments would allow their staff to attend) they would "pooh pah" our ideas and basically KM had to fend for itself with no support.

So, KM basically lay dormant for a long while. My boss left and the Dept became 3.

Now we have yet another new President. She's really big on cultural transformation and change. So, to get her buy-in on KM, we're focusing on creating a knowledge rich culture and she loves it. She's also decided that the physical Library should be part of the KM Dept.

IMHO, Management support plays a huge role in whether KM initiatives take off or not. At the same time, because it's still something relatively "new", it's also about how one "sells' the concept to Management. Once they're ok, it's up to the KM team to chalk up 'successes" (I do this in the form of Success Stories) and constantly communicating with Management about what they are doing (I send Management a monthly newsletter on KM activities, etc)

In order to get management buy-in, you either have to have a leader who gets it without having to be sold, or start to speak the language they understand. Business leaders are looking for ways and means to help them to reach their business objectives, and I have rarely found one that can be convinced with soft, difficult to measure benefits (time saved, increased speed and quality of decisions, etc).
Find an area where there is a significant issue, a critical risk and sell risk prevention or mitigation rather than KM. KM is embedded in the solution, but they don't often care nor need to know.

Example: The Big Crew Change - in our industry the demographics are horrible. The bad old 90's meant downsizing, so what you are left with now is a bimodal distribution of mature people getting ready to retire in the next 5 years and new employees with 5 years or less experience, but very few in the 10-20 years experience range. How do you mitigate the risks inherent in all of that knowledge walking out the door? Is the Business Plan do-able from a human resourcing/competency requirement? Recommend specific, pointed solutions that identify and retain critical knowledge and increase the speed of knowledge acquisition for the new people.

Middle management poses a bigger barrier unless they too already get it. They're all from Missouri - you have to show them. Convincing them that knowledge seeking or sharing activities are more time effective and yield better results than just focussing on your asset and getting the work done is a tough sell. If you can gain upper management support, then it becomes more straightforward. If the required KM activities are supposed to be built into the business processes, then there can be measurements implemented to demonstrate compliance (Have you searched for previous solutions to this problem? Did you consult with x? etc.)What gets measured gets done.

If there is no imposition from upper management and you are coming from a position of bottom up, then things will work if you have a functional organisation or you are effectively managing the functions as a discipline across assets in an asset-based organisation. Use the disciplines to define their own discipline KM requirements, and have them champion KM. Effective use of KM will show in improved quantity and quality of output, and thereby satisfy middle management. If middle management can define the deliverables, then they will be less concerned about the process by which they were achieved. Once sold by results, they become eager to replicate.

In our company there are three examples.
- The first is functional sharing on a local level.
- The second is getting Global management buy-in for functional KM across regions, and
- The third is for cross-functional KM within one office.

1) Functional KM on a local level.
Within Engineering Division, this is the standard story:
- Executive leadership, start with a pilot, show results, expand scope.
- We missed here the buy-in from HR and IT, and managed everything within the dept.
This got approved but without buy-in from supporting functions. Results are limited because of this.
Also, the limited scope in the company brought no change in culture.

2) Functional KM on Global level.
Get a Vice President from (1) to champion the selling to Global management.
Salient points from his presentation:
- Management buy-in: Focus on cost reduction, no $ but long term value.
(Tools, Reusable Engineering, Standardization, Education/training)
- Employee buy-in : Sharing culture, link rewards to contribution: yearly assessment
- Global Project specific quick wins
- Global CoP's for competitive edge technologies
- Common taxonomy (not existing yet)
- IT facilitates, not lead : Distributed databases & custodians, common portal
Qualitative benefits;
1 : Free-flow of information -> Global organisation
2 : Change corporate image in the market -> Leading practices
3 : Lively, vibrant, sexy organisation to work in
4 : Bind organisation, and retain knowledge
Quantitative benefits:
1 : Cost reduction through man-hour savings. (Committed by VP)
Approval received and going strong with Standardisation as the winner.
Global IT was initially the bottleneck, and HR is not necessary on global level.

3) Cross-functional KM on local level.
Propose multi-tier approach:
Overall lead: KM Champion
Knowledge audit - KM champion
Culture - HR leads. Organisational learning program.
Process - Quality Dept leads. Embed custodianship of portal content in ISO.
Pilot Projects - Under Balanced Scorecard lead: cross-function teams
IT - IT leads intranet redesign.
Proposal Approved with complete buy-in from all operations!

In a service organisation, a cross-functional team to implement KM is formed. The Project Manager is from the KM Department and the Project Sponsor is his Director. The initial KM roadmap that they present to senior management includes developing a KM strategy, doing a cultural assessment and starting work on a foundational document and records management system. The presentation to senior management goes smoothly.

Along the way, the Project Sponsor decides that maybe he need not be the Sponsor after all, and decides to get the newly-promoted IT Director to be the new Project Sponsor. Big mistake, for as circumstances would have it, a CTO is recruited into the organisation about the same time.

CTO and IT Director have different views about how the project is to proceed which leaves the project team very puzzled as to who calls the shots on the project. It suddenly becomes all about technology.

One thing they both agree on is that a KM strategy and knowledge audit is unnecessary at that time, and that it is more important to call the tender for the system and have it deployed.

All resources goes into building the document and records management system, with both chiefs having different and separate influences on how the IT systems are to be configured - so there is not just a DRMS, but the works - system integration with other back-end systems (ERP, SCM) and with the front-end customer systems, with complex metadata repositories, crosswalks, etc. etc.

The Project Manager from the KM Department is concerned and raises the issue of the risks with his own Director. There is no KM strategy, no processes defined, no roles assigned for content management, no participating end user departments, and no content identified, and the response is "there is a process for escalating issues on projects, and that is to take them to the Project Sponsor."

In the meantime, another inspired project springs up - an Intranet project by Corporate Communications.
The KM Project Manager jumps on the opportunity to do a knowledge audit of sorts. He is given 2 weeks to complete it, so he chooses the quick and dirty way - using an Excel template. Same thing - system with hardly any content, and hardly findable content.

Years after, the rivalry continues and the DRMS is still not in sight. Management says nothing seems to have happened with KM in our organisation. The CTO is made CIO and the IT Director bows out - of the organisation.

Management buy-in is useful only when it is for doing the right thing and by the right people. Even if Management may buys in, they may trust the wrong guys to get the job done.

In this story, KM becomes the victim of the political rivalry between 2 senior management members - a sad but real possibility!

I work for a faith-based organisation, brought in to manage OD. The organisation's culture is highly relationship oriented and maintained by personal interactions. In addition, KM, within our context, has to make do without technology most of the time because in many areas access to ICT is limited.

At the beginning I was misreading the organisational culture and did not take it into account enough. Thus I was brought down on occasion by questions like 'where does faith come into this?' The point that I am trying to make is not whether faith plays a role, but relationships and organisational culture certainly do. If my aim is to see that change in my organisation happens, I won't achieve it without the collaborative efforts of many.

I had to backtrack, spend time on reading the cultural signals/rituals and cultivate relationships with all key stakeholders. In my work, socialisation has played a big role. Through this it has become easier for me to ask for help from those who might know how to solve the problem/gain access to key people/resources. What didn't work for me was short-cutting on building relationships and not maintaining a network inside and outside my organisation. As mentioned in other contributions, sharing stories has also been one of the most useful tools for me.

This isn't a story as such. Getting management buy-in is a continual process. I preface these remarks by saying that I have worked mostly in law firms. Law firms are owned by the partners in the firm and it is usually therefore necessary to get buy in from a majority of partners, and sometimes an absolute majority or even 100% consensus. I take every opportunity I can to promote the benefits of KM to the decision makers in my organisation (partners and senior manager colleagues). I use anecdotes, stories, research papers and occasionally even gossip about what our competitors are doing or what our clients are saying, to get my point across. I don't drown people in information - I judiciously distribute materials to people according to their interests. So, for instance, if a decision maker has a pet project that I know would benefit from a particular KM technique, I will contextualise information about that technique for that decision maker. If I see a KM success story reported somewhere that has obvious and direct relevance to something my organisation is currently doing, I draw it to the attention of the relevant decision makers. This is labour intensive and requires a good understanding of the business (which in itself is a good way of getting buy in), but is essential in the kind of organisation that I work in. I cross promote the work of my team. I use KM techniques to leverage the work of my team so that we can demonstrate that we, as a team, are producing more without increasing resources. It's a very incremental process.

KM with a difference! In 2004, I was appointed as a Learnership Manager in our Region, ie Kwazulu Natal, South Africa. My role was to facilitate Skills Development KM within the Contact Centre Industry and to manage the process of Learnerships (structured program of knowledge training and workbased experiential learning). Our Learners were mostly unemployed matriculants and some graduates with a degree but no work experience.

About 6 months into this role, it was fascinating to discover that companies, both large (corporate) and small had mostly ignored KM, although knowledge and company information were accessible, the information had not been documented, nor had anyone taken the time to set up a task group to document procedures, policies and/or operational information to an extensive and detailed extent.

One of the requirements of a Learnership is to collect company specific information pertinent to the unit standards and subsequent assessment criteria in the Qualification and place the evidence into a POE. (Portfolio of Evidence). After a 12 month period, the Learner and his/her POE undergoes a series of stringent assessments and evaluations to determine their competency against the Qualification which has been run as a Learnership (funded by the government).

So, if all the levels within a company are not consistently communicating their operational methodologies with each other to benefit the growth of the people and achieve its company targets, then the company won't be going anywhere anytime soon. Yet it is amazing how KM is simply not part of many companies' strategic goals to achieve profitability, solid growth levels, and a competitive edge.

What the Learnerships have done is to educate companies, both big and small, to manage their KM in such a way that every staff member, regardless of position, actively contributes to updating their specific company knowledge and information on a regular basis. Further, many companies who specifically participated in Learnerships, and many who still do, have set up task groups to mine the information within their environment and to document the information in such a way that is visible to its staff, management and its customers/clients and consumers.

There will always be changes in any environments and structures, but if there is a solid and enduring manner of managing information, and ensuring its visibility and accessibility, then those companies will be the "good to great" companies in the future. KM I believe can become a competitive edge only if awareness, commitment and a call to action exists.

Perhaps to conclude that Skills Development in SA has enabled and empowered the Strategic KM Consulting industry to flourish much faster than was previously imagined or intended, as well as growing our Contact Centre Industry exponentially.

I have been in this knowledge management role for five and half years and going stronger every year. It's blessing and it's also bloody hard work in the lifecycle of getting management buy-in.

I work in a utility company where ageing workforce and retaining skilled employees have been issues, not only to KM but also to HR and operations. Senior managers support the concept of leveraging and transfer of knowledge for the long-term of the organisation. However, getting drivers and input had been a twisted learning curve.

On top of my head:
- don't have too many fancy words and concepts - keep it simple.
- Don't flaunt KM as it doesn't mean much to them - show them the outcomes achieved by using this process
- Deliver or complete the actions that you promised them
- Continuously be on top of the politics, strategies and people movement
- involve them and other key stakeholders in introducing or chairing knowledge sharing forums, particularly those with a large audience to raise their visibility
- expose them to different technology transfer sessions that have external stakeholders who compliment on the knowledge sharing outcomes
- cant stress enough about working groups, enrol the cluey people in the possibility of doing things differently and they will spread the words for you. I can't thank them enough for word-of-mouth as they are usually technical specialists. And specialists network and listen to other specialists that they trust.
- Make sure KM is an item on the General Manager's performance agreement or an organisation strategy, possibly on perennial basis
- Align, align, align! with relevant projects and business functions
- Choose a supportive upline management, that's a bit of luck
- ensure you've obtained funding and find out all the ways to align to the funding path. Money talks.

Experience of getting mgt buy in. Examples of Knowledge Manager positions created:

Office Equipment Co
Joined in the Services Branch in a unit specifically set up to deal with Knowledge Management - Unit included a Business Analyst, Industrial Psychologist, and Knowledge Management Expert (me, last person recruited to the group)

Getting buy in - the Mgr who set up the unit, had come up through the ranks, suppose was trusted by the Snr Mgt, was persuasive in selling ideas, a Knowledge approach possibly sold as an effective way to compete in the market (Xerox had implemented a KM program), also he teamed up with the Training Division Mgr (group responsible for trained the service techs) - together they sold the concept, and got the buy in to employ three people.

There wasn't much evidence of the process / or scope around the objectives of the unit or how it related to the rest of the organisation

The Mgr, left six weeks after I joined. There was no leadership or advocate to carry KM didn't really take off.

Health NGO
Joined a Health NGO as the Knowledge Manager part of the Mgt Team

Getting buy in - the NGO needed to radically change the way it did things (due to increasing costs, govt requirement to service a wider area) etc, a Snr Director together with the CEO drove process to rethink the service delivery model. This consultative approach over a long period of time (about a year) - the Snr Director was the one behind making the NGO focus on knowledge as a key asset and effective way to delivery services. Snr Director - articulate good and selling ideas, and carried out endless consultations across the organisation, - the Board approved the strategic direction where distribution, contribution to knowledge / information were essential processes, and the Snr Director got the go ahead to appoint a Knowledge Mgr.

In both cases, the mgt buy in, came about through convincing advocates who got to some extend what KM is about, but were not experts, and there was an organisational need for something different, new to happen.

I told a story earlier about KM being over-delegated, where senior management time and attention simply could not be captured.

Here's another example we've come across as consultants a number of times, where the sponsoring leader remains a mysterious figure behind a veil. There's no direct contact with him/her, and the KM team are very inexperienced. It's impossible to get to see him/her, for whatever reason.

So when we are in a technically demanding and complex area, like taxonomy development or portal specification, all the detailed analysis and advice we give is refracted through staff who only get a portion of it, and are not terribly good at explaining that.

Added to this, the sponsor has ideas of his/her own! So decisions are made which are radically different from the advice we give (not even contradictory, which would be simpler to deal with). In a complex project involving multiple activities, this "shadow play" can become extremely bizarre.

I'm the knowledge manager at an Australian professional consulting company.

In April we started to get very good engagement for KM at a director's conference which include other senior managers such as myself and the HR manager.

After the conference the HR manager had an action to re-develop the performance review process to address (amongst other things) the inclusion of knowledge sharing behaviour / discussion. The HR Manager and I had some subsequent discussion including me providing some suggested KM behaviours for different staff levels.

Last week, I found out indirectly that that work has gone ahead (and is about to be implemented in one part of the company). So I asked the HR manager whether I could see the current drafts. The response was "no, because you've got a very specific focus and you probably won't see what you want to see" and "we're keeping only a small group involved at this stage".

I'm still not sure what's going on here.

I was reminded earlier this week of an event in 2000 when I was working for SMS consulting that demonstrated the dramatic and adverse impact that inappropriate management can have on a community of practice.

A small group of consultants interested in knowledge management had started meeting regularly and over several years the group had expanded to include members in all other SMS offices. While the company provided support in terms of facilities, beverages, food and permission, we were for a long time just tolerated rather than valued.

When the company realised that knowledge management had business potential and that their little CoP had developed methodologies, presentations, business development materials and had in fact completed a few projects, they decided to take this KM stuff seriously.

So, they appointed a manager to 'oversee' the activities of the group. At his first meeting, the manager advised us to stop developing these materials and our new priorities were to be the development of a business case to justify our continued existence and a document development schedule. We were thrilled – NOT!

As soon as we started making a difference we were to be diverted from work that contributed to our practice of KM. The next week most of the group didn't turn up - same the week after. Fortunately, after a 'either he goes or we go' chat with the regional director, the new 'oversight' arrangements were removed.

I am an Australian public servant and from my experience it really does depend on the leader of the organisation. The last Department I worked for had one particular Secretary who understood KM, actually knew Dave Snowden, and was a big fan of the use of story. Consequently the words KM did not instill negativity in him. The came a change of Secretary who was concerned about the lack of accountability and core business process in the organisation (and rightly so) and put all his energy into fixing these issues. Combined with a manager who was a complete linear thinker and who was completely unable to understand any KM concepts (even after 9 months of continually trying to educate this person), the KM ideas have gone down the tube.

I am now working in a small Australian Government R&D organisation (48 staff) where KM is just part of everything you do everyday (yes this is KM nirvana). This is all driven by an amazing leader (Executive Director) who speaks KM wherever he goes, in everything he writes and in everything he does - very inspiring, and the whole organisation follows suit. He is the one who inspires the staff to KM thinking and acting.

I am not so sure that KM buy in is possible unless you can use KM to solve something that is burning your CEO. Every time I see it work it is a leadership issue combined with the passion and commitment of staff being lead effectively. Just my 2 cents.

I work for a mid sized Local Council in Sydney. We had executive agreement for our KM program in 2001/02 as long as we didn't call it Knowledge Management. Our small team is still progressing albeit very slowly with our "In the Know" program.

We have had great success with activities that we combine within other projects. Mapping the flow of information within service delivery was a win for our EDMS implementation, and the replacement of our major accounting and asset systems. It was also used by the management team in redesigning our business and management plan reporting structure.

We will shortly exist as an independent group in the organisation structure that reports directly to the GM.

On the down side, our management team do not formally accept KM as a one of the management disciplines in the organisation. Our sponsor on the Executive Committee played an active part in promoting the KM initiative, but with her resignation in May this year, we've been had to rely on the GM, and KM is not high on his list.

I believe we will have an active part to play going forward, but we'll have to sell every initiative to each and every department and hope our timing will be such that they will have the resources available to work with us.

So lots and lots of work developing programs, plans, strategies, and selling to various managers. Hopefully over time we will get some wins which will lift our programs priority in the minds of managers, but until KM gets acknowledged as a management discipline in our Council, gets a place of its own in our management plan, and gets included as a deliverable in senior staff performance contracts, we will have to continue working away at the edges, and as a add-on within other programs. and projects.

Here's another one: big organization goes through a complete KM strategy process, with their CEO and senior management, including culture study, knowledge flows and collaboration study, high level knowledge assets audit, acknowledging that KM was about managing multiple forms of knowledge, from documents, to skills, to experience, etc etc.

They provide key input to (and endorse) a roadmap with different tracks according to their needs, covering infrastructure initiatives such as consistent policy framework, taxonomy, fostering collaboration through communities of practice, knowledge sharing through identifying critical knowledge sharing opportunities and setting up projects for them, etc etc. The CEO says very firmly, "KM is a critical enabler for our strategy".

The project team was in the midst of planning their pilot projects, very neatly combining collaboration goals with knowledge sharing goals, which focussed on one of the organization's key competencies.

The CEO says one day "our new Document Management System is not being used - we need to get all of the documents that are now in shared folders and team rooms into a single system."

The KM team is told, "drop everything, including the knowledge sharing project, and focus on migrating the documents into this repository - you have five months".

Everything they had presumably decided on the diversity of knowledge forms is dumped in favour of documents, and none of the policy process and knowledge architecture stuff is in place. It's like brain-wipes have happened across the senior management team, and the KM team - amazed, confused and frustrated - are being asked to create a document warehouse with no structure, no process for keeping it alive, in the face of probably universal opposition from the "owners" of the documents, which are entrenched and comfortable in their current environment.

Crazy, but true.

I think an after 'in'action review is very helpful in bolstering your case-making for the next situation. I don't think we can write off failed KM proposals by simply lamenting that the customer didn't get it. *Why* didn't the customer get it? What can be done to reach others who don't get it before it is too late? Let's face it, few prospective KM clients are KM savvy, and so our first task is to somehow 'connect' with them in a dynamic way.

Jerry Ash AOK

Recently I attended a meeting of KM aficionados. There were people with some real chops -- genuine pedigrees that indicated they were if not thought leaders, they were early adopters in the KM field -- in the room. Consultants, academics -- folks I have talked with online and a couple that I had met with in person. I was excited and was looking forward to the presentation!

After the initial buzz and networking [and the arrival of several boxes of pizza], the group settled down and the main speaker took the floor. I had my folio out, my pen uncapped and leaned forward to hear what he had to say. About four slides in, a table came up with the 10 top things that CEO's were concerned about. HALLELUJAH! We were going to talk about KM in the real world! I was psyched, I was salivating, I was ready to take notes. Then the presenter flashed up the list – and as I was writing it down, he made a comment to the effect that this is what the CEO's were worrying about, and they were worrying about the wrong things. Huh? I stopped, sat back and watched the presenter. Yes, he said that the concerns of the CEO's were irrelevant. Huh? I looked around. People were nodding. The CEO's shouldn't be worried about income and customer retention, they should be concerned about.....

I put down my pen. The rest of the presentation was fascinating, intelligent and interesting. I enjoyed it immensely. But I learned nothing that I could take home with me and put to work the next day. Why? Because I couldn't get past the message that we KM high priests should enlighten those poor slobs in the business world on how they should be running their companies because they just don't get it.

In the discussion later, one consultant outlined what his customer's expectations were and asked the question: do I give the customer what they want or do I give them what they need. Tough situation to be in -- been there. I perked up. The consensus of this group? Don't give in to what the customer expects -- give them what they need and tell them why it is better. At this point, I asked about managing the customers' expectations -- maybe package your solution to look like theirs? Again, the consensus was: they hired us because we know what we are doing so do it.

I was done.

Carol Tucker AOK

Reading a proposal on KM for Bankers

My first reaction to the proposal was that it looked pretty good; then I decided to read it as a banker. When I read it in that light I would not have accepted the proposal either, but why?

First of all the Executive Summary lead me off into a philosophical never-never land that just wasn't part of my world. Yes people are "profit-leverage", but you are going to have to tell me how – real quick.

Then half way down the page I hit this sentence - The risk is that these benefits would not be realized in any tangible fashion. Sorry, but in my "world" as a banker I can't accept any risk.

So here is a suggestion for starting this proposal. (Excuse the layman's terms in the following, I may not have the lingo down.)

People = Money

Money = People

The bottom line for a bank is that it needs to make a return on the investment of its shareholders. We do this by making a profit on the money that we have, hold and invest for our customers, on behalf of our customers and shareholders. How do we do this, we do it with people and the knowledge they have to make the best possible decisions.

So people have knowledge that leads to profit, how can we leverage the knowledge within our people to make this happen?

Ok, it may not be much of start, but the idea is to hit them between the eyes in seconds and get their attention. Leave out all the KM stuff from the intro, and relegate to quiet subtleties underlying the key projects to be done.

Paul Cripwell AOK

A Buzzword Bonanza Proposal

I recall sharing a proposal en route to delivery to the customer. I was on a plane to Geneva with a colleague who coached and lambasted my effort as 'buzzword bonanza' and queried every line (apart from the financials) with a red pen. What he didn't appreciate was that most of the buzzwords were the customers and that like any company they had a jargon ridden way of managing their affairs. He also failed to ask about my relationship with or characteristics of the CEO! In the event the CEO called me on the basis of recommendation by his brother with whom we had just completed a successful project.

Further on the basis of the previous visit I had worked out he was the MAN (Money Authority Need) when I'd enquired about my expenses and he'd leapt out to ask his secretary for his company cheque book. I'd also realised at la Perle du Lac restaurant overlooking Lake Geneva he was an extraordinary entrepreneur. - During the course of the meal after the equivalent of a Grand Prix drive round Geneva in his Ferrari, he spotted a plane landing at the local airport and mentioned it only had one landing light working. How you know, I asked. It's my plane he replied. It was a jet!

Richard Cross AOK

Selling KM by the Powerpoint

I'm wary of selling 'KM by the Powerpoint' or the 'send me an executive summary' request favoured by top consultants or busy senior managers when they want to 'discount' your ideas. The trick is to take control of the sale by 'connecting with the CEO ' as Jerry called it in his introductory note and connecting through smart questioning with the agendas of 'acolytes' as well as those with appetite for change. More recently I've also found that time with or support from the CEO does not guarantee success. -

Marshalling internal resources to build the compelling case for change becomes more crucial. Many of the sales teams in the IT industry I work with go through a rigorous 'political mapping' of the customer environment and impose a 'man marking' (executive engagement) scheme to support their cause. Whilst I don't enter into their speculation though, rudimentary social network analysis before a sale is revealing.

Richard Cross AOK

On why a KM proposal failed

The core problem and cause of the outcome was, I believe, complacency.
The officers did not have any sense of urgency about change. They, and to some
degree the Board of Directors, lacked a vision of the world as it is and lived only
in what worked in the past. Once the case was made for change, most of them
gave the new programs compliance and lip service rather than full commitment.
Add to that a corporate culture with the POV of once you became an officer, you
would not be fired, and you have a recipe for stagnation.

We tried to change that culture. We by-passed the truly adamant top dogs and
went to middle management. We appealed directly to the associates. We
recognized, rewarded, modeled new behaviors. We ramped up training -- C&F
was more focused on development than any other organization I have been
associated with! We worked at creating bridges across the traditional silos.
We broke down the elements of my KM proposal and implemented as many
pieces as I could by incorporating them in processes. And, after three years of
hard work and melodrama, we just hadn't moved far enough.

Carol Tucker AOK

Where do you start? With a mandate that simply says "something isn't working, fix it", there is good news and bad news. The good news is that you have a blank slate and can be very creative! The bad news is that you have a blank slate and can be very creative....

Of course, you start with your boss, and you establish what it is that s/he is expecting of you. In this case, I was coming in with a mandate from the President/COO -- but the person to whom I would be reporting painted the needs with a much less grand scale. To illustrate, here is the list of things I was given by my boss, the in-house attorney who was running Loan Servicing, the first day to address:

• training on the Loan Accounting System [LAS] used
• ramp up to reviewing and signing releases and review the
bank's release, VOM, payoff, fax fees and see if increase or procedure
change is in order
• Notes, Deeds of Trust and Title Policies - establish a procedure to
track receipt, and dun title companies
• Fire Insurance - establish procedure to track and maintain
• Private Mortgage Insurance - establish procedure to track and maintain
• Credit Scores - coordinate data input for 1000 loans now on shelf.
procedure to have origination's list on set up sheet for new
origination
• Property Tax Service Company - identify outsource options, review our
procedures and make a recommendation.

Note that there is nothing there about assessing the personnel or restructuring the department! And yet, I was pretty sure I was going to have to do something rather radical -- this bank had just gone under a Supervisory Agreement and according to the OTS, there were some basic monitoring and risk management controls and reporting that were missing.

One thing that I have found is that you do not come in and start changing things without finding out why the people are doing what they do. And you measure what it is that they are doing as compared to what you have seen at other organizations, the regulatory requirements and common sense. And you look at the way the work flows -- who is doing what, when and where. At this point I had 21 people, some had been there for almost 20 years, some had only been there for a couple of months. I didn't even know all of their names much less their knowledge, skills and abilities [KSA] -- and I didn't have much very long to figure it out

I spent a lot of time taking people to lunch!

Carol Tucker AOK

"Selling KM"

In the early days of my career at Xerox   I was responsible for sales training and worked alongside one of Neil Rackham's http://www.huthwaite.co.uk research colleagues. Neil made his fortune and business working with many blue chip names such as Xerox, Oracle, McKinsey, IBM, and Citicorp. Roger Sugden, whose research contribution was pivotal worked for and alongside me. Roger used to say that enthusiasm was ok for the small sales but needed to be curbed in the big sale. He also 'coached' me into 'objection prevention' rather than objection handling' as well as the art of 'preparing the right question.'

When confronted with the   'show me the ROI' types, he used to assert two key points:

- customers place higher value on what they conclude than what they are told
- customers place a higher value on what they request than what is offered freely.

The most important point I recall from my foray in sales training is that a customers concern in a complex sale is risk. According to Roger, 'consequences', risks of going ahead with you, must be 'managed.

Most lurk behind the surface. Roger also used to point out that 'difficulty stating', quibbling over minor points (like the pantone colour of a slide), asking for demonstrable ROI, jargon bashing could also be early warnings on risk and customer insecurity. Price concerns and 'guaranteed ROI' then become respectable and convenient ways to express concerns over consequences. It's a lot easier to tell you that they have decided not to buy because of these issues than to explain issues such as mistrust, scars from mistakes made before, politics, hassle, I'm not interested, risk (to career or company).or the simple fact that they don't like you.

What fascinates me is that consequences are psychological issues in a persons mind. They are not in the real world - only the customer can resolve them. In selling KM and TQM then Roger would advise me to 'help the customer, not resolve the problem on his behalf'. He also constantly reminded me that with a complex sale the important things happen after you have gone. That's why he constantly pushed me to focus before meetings on smart questions. You know the ones that stop people in their tracks and because of their implications as well as opportunities carry on working after the sales call. Of course I accept that selling KM as an internal has another layer of complexity called organisation politics and personal career management.

Richard Cross AOK

Challenging Conversations

If I reflect back on some of my more successful ' KM' and 'TQM' sales calls as well as those ghastly failures. A couple of points stand out -on the plus side where it worked well was where I was able to home in on the focus of 'dissatisfaction 'and developed the dissatisfaction to the point where the customer wanted to take action and explore this dissatisfaction with the focus of power in his organisation. One case springs to mind when I was brought into a customer by one of our Account Managers as our man on KM. I remember the meeting as if it were yesterday: (well it's easier to remember victories rather than defeats)

1. It wasn't a polite interrogation, rather a challenging conversation.

2. The challenge from me to the customer (and vice versa) was also crucial. After fifty minutes of 'sparring' and focussed discussion I summarised my perception of his situation as :

'it seems to that with your sophisticated analysis and clear vision you're the only one in the organisation who understands what really needs to be done and cares about the consequences of inertia. Your problem is how to enable others to achieve the same level of urgency and really want to do something about it. It's about developing a shared perspective. It's not something you can do by yourself.

So how can we best address the issue? he equested.

It's a much stronger position to be requested to help than have to prescribe solutions! All those sentences that start with 'if I were you', 'my recommendation is ...'the way to handle it is'.. can be simply irritators that raise resistance. Fortunately I was saved by the bell (his mobile) and able to gather my thoughts before I responded.

There were two other factors that enabled successful sale of my KM like proposal (I used the K word three times in the proposal). Firstly the 'friend of a friend meeting' had been set up by a smart Account Manager who absented himself from the meeting on my instructions. Secondly I was lucky, - the client had (I learned later) been 'mauled' for his academic and visionary ideas by his colleagues. Like yourself Carol we adopted a 'stealth approach'; the training budget took quite a hammering that year.

Richard Cross AOK

To balance the success story, in contrast to the challenging conversation I just described   there was another KM/DM sales effort that didn't work out. The sale was made and we got the work but for a number of reasons I complied too early on to the customers whims and became a victim of their own insecurity. Relations were good with the CEO/IT director but as the project started they disappeared from the scene.

My 'project team' started to vet my work, edit the slides I produced (there was one powerpoint character they banned!) and sabotage all efforts at progress.

Yes I was consulting with a dysfunctional organisation. Hoist by my own petard of competitive desire to knock out the competition, I'd not read their organisation culture. I should have spotted that the smokescreen of questions and objections from the junior level were symptomatic of their resistance to change.

They'd created a bureaucratic process and through a bureaucratic process they subverted all attempts at real change. There are some organisations that are neither ready nor capable of changing.

Richard Cross AOK

Although I'm with a Fortune 500 company rather than a small/medium business, many of the issues are still the same and in some respects are compounded because of the increased size. The culture here is very bottom-line, quantitative, cost and schedule focused, which means that even improvement efforts in quality or customer satisfaction have to jump through financial hoops before they can get implemented. So something as fuzzy and "woo-woo" as KM is an even harder sell. I have been pushing KM here for 8 years and just last year managed to get a job created for myself with "KM" in the title.

I have been looking at organizational learning from a process, connectionist perspective. Other "things that learn" (brains and neural networks) don't require leadership -- they just learn as a result of their networked structure and processes. So if I can embed KM activities into the existing processes of an organizational network, people aren't "doing KM," they're just doing their jobs, but the organization is learning.

The primary ways for getting ahead in my company are solving problems and completing projects, both of which on the surface are very linear and time-dependent processes. This has resulted in a culture where feedback loops, which in my mind are at the heart of KM and learning, are lacking in many processes.

Reflective activities such as after action reviews or root cause analysis are seen as time-wasters because the goal is to get as many problems solved or projects completed as quickly as possible. One of the parallels I see between a biological network and an organizational network is the need for "sleep," or a time to shut off external inputs so that it can sort out and make sense of what it has experienced. Brains have this hard-wired into them (in fact, I remember a Scientific American article many years ago that commented that almost every organism except humans spends the vast majority of its time just sitting around doing nothing -- ah, the good old evolutionary days!). I think organizations need to have this hard-wired as well, rather than reflection taking place because someone thinks it should. Otherwise companies like mine can end up with "organizational sleep deprivation" in the drive to get things accomplished.

So one example of where I have had success is in the new product development process. The product goes through a succession of scheduled "builds" as it evolves from concept to manufacturable product. I have convinced the developers to bracket each build activity with a Before Action Review and After Action Review. The BAR is to get ready for the build and the AAR is to collect learning from this build to use for the next build. Part of the process is to collect and review data from AARs of other projects. This works because, although it is reflective, it is also linear in the minds of the engineers -- they see it not as KM but as a scheduled step along the way to a goal. It is "unconscious" in the sense that the process steps are all laid out; all that the people have to do is execute the process for organizational learning to take place.

Dennis Pearce AOK

The "dog team" style of management is the way that I describe a place where the saying that "the view only changes for the lead dog" is all too true! In that kind of organization, if the lead dog want to talk to one of the dogs further back, he has to relay the message down the chain of command -- and if one of the dogs in the back want to talk to the lead dog, the message has to be relayed up the chain of command. It is a very old-style, hierarchical management model.

There is an advantage to this style of management -- convince the top dog and you at least have resources for implementation. The disadvantage is the subtle difference between commitment, compliance and lip service. You are guaranteed lip service, you will probably get compliance -- but commitment is hard to come by!

Carol Tucker AOK

The going-in assumption always seems to be that the organization wants to learn, and that it is capable of learning. Interventions and solutions are based on understanding that the organization wants to change (independent of the feelings of the individuals that make up that organization).

But what if the organization doesn't want to learn? Or, as I think is many times the case, what if the organization is incapable of learning? What if the organization is "learning disabled?"

Brett Miller AOK

This is an example of buy-in within a university. There was a change in structure at the same time as the arrival of a new Vice Chancellor. There was a team approach to restructuring with a process of engaging the staff rather than just top down restructuring initiated by the management. The timing was good with the new Vice Chancellor, and there was a willingness to consider new ideas and approaches.

Canberra Oct 2006

This is a story of getting group buy in for KM. This case is about a help desk contact centre for a KM system and Knowledge bank. It was supposed to play a coaching role. Management wanted a concrete system of logging questions and requests for training because they wanted to reduce the handling time. It took time for the team to compile the logs, but they recognised that it was necessary to maintain management buy-in.

Canberra Oct 2006

When our team was trying to get highest level support, we tried to ignite the spark of "how can this make a difference to me?" We identified the two biggest problems, and created a scenario around the problems to demonstrate the time and the cost (weeks and $$), to get an answer/solution. We showed how a KMS could change both of these elements. The manager saw the value, even if it did not do 100% of what it said, and supported the project.

Canberra Oct 2006

Back in 1999, our department got support for the intranet to be used as a tool for breaking down silos. We set up a work in progress template and a site. We got support because it was a simple solution to information sharing, and we used clever presentations aligned to management's reporting systems. The Minister's staff could access it. But it was never implemented.

Canberra Oct 2006

This story is about the implementation of a HR system where the effectiveness was severely marred despite enduring executive sponsorship and senior management sent delegates.

Canberra Oct 2006

In the development of the TARDIS system, the managers were all competitive types of individuals. We used statistics and problems with the current systems to show the laggards and jet-setters. This set the competitive scene for getting senior management buy-in for their areas of responsibility. Six months later the metrics started to pay off in buy –in.

Canberra Oct 2006

This is a private sector petroleum organization with lots of regional offices. A knowledge manager was appointed to look at knowledge loss from staff turnover, especially related to OH&S and Procurement. The knowledge manager was employed by HR because of the types of issues, and the managing director supported this. We used the ROI approach: assurance, productivity etc, including succession planning for staff replacement. We took the managing director and sat him on a shift to see the actual problems. The managing director was able to make an argument for the costs to the organization on the basis of lost knowledge due to retirement. We gained buy-in by showing the direct impact of the initiative.

Canberra Oct 2006

Your project must link to key issues in the organization to get buy in. Need to move from process to people-based thinking – to fair dealing with the clients.

Canberra Oct 2006

In Medicare we were looking at improving the systems among the customer service officers. We used an IBM idea to "find the foxes in the organization" ie those who knew the connections and who to link up to who.

Canberra Oct 2006

In our current project we were able to get buy in from one particular region because of our experience and also because they had specific business applications that would benefit from the project. We will continue to use this strategy, but will tweak it as appropriate.

Canberra Oct 2006

Our organization is run by a Board, and the chairman is very pro-KM. He put together a task force to tie strategic goals with outcomes, and used this to gain buy-in at lower management levels. When I made the presentation, three board members got up and left, and I was told that KM was only of interest to the chairman, it was a waste of time for the rest of the Board. Six months work on the framework etc was wasted. There was no buy-in because there was no value seen. The Chair had thought he could push it through, but it was a very territorial organization. The Chairman subsequently left and continued efforts in KM continue to be blocked.

Canberra Oct 2006

Our management didn't like the word "knowledge" – they wanted something concrete. We collaborated with the rest of the organization to get a strategy for change – with a tangible outcome that has value – eg metadata tools, more sophisticated than just using metadata. There were misunderstandings about how metadata is used, different understandings across the organization about what a taxonomy does. We approached it from a governance standpoint, using Peter Shergold's words. The issue of currency of information and integration of information came up as an important one.

Canberra Oct 2006

Our positive buy in experience is simply don't call it knowledge management! Management sees that as a philosophical discussion. Call it business intelligence reporting or single point of truth for marketing.

Canberra Oct 2006

We suggested a high level knowledge audit to our senior managers. We were surprised to find that one of the managers offered to pilot it in his unit rather than where we expected, in IT. Hence he was interested in it.

Canberra Oct 2006

This is an example of a delay in getting management buy-in in a federal government dept. The business case was strong and good and accepted by the organization. However, the CIO was retiring, and there was no clear individual who had the power to take decisions on the matter. We eventually went ahead with more than a year's delay. There was also an external advisor who meddled and added to the delay.

Canberra Oct 2006

In setting up our KM group I actively avoided trying to get management buy-in. I went directly to the potential participants and waited to go for management buy-in only after we had some success to show. Buy-in occurred because it wasn't seen as a risk – we already had some success to show.

Canberra Oct 2006

We were working on an EDMS project: selecting and implementing a system headed up by a Director. We selected a system and went back to the executives with a costing which surprised them. They backed away, with the excuse that this was a lower priority in the overall IT needs.

Canberra Oct 2006

We wanted to migrate our hard copy records to a DMS to create a consolidated repository. Management were not happy with the idea but we went ahead and implemented as part of an existing project. It's currently working well and now being picked up by our other offices. Management "allowed" the initiative.

Perth Oct 2006

This is an example of a data warehousing project. We had a couple of successful pilot projects. However it takes time for people to realise the benefits. We couldn't get resources or management commitment after the pilots. There was a lack of realisation of benefits by key business people.

Perth October 2006

In our templates initiative we discovered that you need courage, and you can consult too much.

We wanted to put in a drawings control system. The staff in the office had been there a long time. We got the support of the managers who were young engineers, and went ahead with the change. We got the staff on board slowly, with regular consultation and asking their advice. They were involved in testing and designing the system. More people use it now, because we delivered what they want.

Perth Oct 2006

We worked on risk management from a compliance and audit point of view. The CFO appointed a risk manager, and approached different managers for support. We used workshops to sustain support. Then the wheels fell off when we lost key people. The CFO and the risk manager left and commitment dropped. It was no longer a priority and we lost momentum.

Perth Oct 2006

This is about an agency that took over another agency and inherited its thesaurus. We needed to revamp it to match the new organization. We had a meeting with the Director to communicate the need, did a briefing paper for the Executive, and a presentation to them on why we needed to revamp the thesaurus. There was a "dawning realisation" of the role of the thesaurus and the presentation was successful. The base thesaurus which we needed to add to was AAA. We consulted the stakeholders to develop the thesaurus and implemented it successfully. Our lesson learnt was to get consensus from everyone.

Perth Oct 2006

In this EDRMS project (a key project) the Executive Director etc had all given their approval, but the impact on the ground was not anticipated. Perhaps we were naïve. We had to go into damage control, but this involved meetings with senior people about why I did what I did. It was a real deep education on how to get a message across.

Perth Oct 2006

In this organization the Librarian is part of the information management committee. There was a problem with the archives and records management – we were running out of storage space. We prepared some proposals benefits, software, costs of not doing it. But top level wouldn't approve it, so we had a substandard way of dealing with the problem due to lack of funds.

Perth Oct 2006

In our organization we had no templates in place. There was a lot of negativity from IT and from those areas that had tried to implement templates before. In three months we were able to do this. We had success because we sold the benefits to the CEO and the general managers and they went with it. It has been a real positive outcome. We used the benefits to sell the project.

Perth Oct 2006

We wanted to implement a retention and disposal schedule. We tried to do this internally but it was not successful. We put up a business case, pointing out that they didn't. have the necessary skills in-house. We got funds for an external consultant.

Perth Oct 2006

This is a case of computer industry sales. There were two salespeople, one for hardware and one for software who were having constant meetings with a government agency to try to influence them to buy before a 30 June cutoff. Finally, the government person said "I am not the person to sign". Therefore you need to make sure you are speaking to the right decision makers.

Perth Oct 2006

We were looking for support to develop an information framework. We had information facilitators who had identified issues and negative audit findings. We had a working party to coordinate the IM framework. We wanted management OK, money, cover the risks, provide support, etc. We didn't get the money – why? The sponsor agreed in principle but did not want it as a project to compete with business as usual.

Perth Oct 2006

The registry function has been transferred into our area. It's critical to have a framework in place (ie a business classification system BCS) before implementing an EDRMS. No one would take ownership. The BCS is being drafted internally by non-technical people, no funding in place to buy in services. The EDRMS project left, and we are now looking at a six month timeframe for R&D, which has engaged an assistant to help. But this assistant is focused on other projects. We're also trying to merge the records from 3 agencies. The activities are all running in parallel with no strategic management.

Perth Oct 2006

In our project we didn't have enough staff and mistakes were happening. We identified that staff were over stretched and had too much work. We informed the senior management but they were not responsive even though we stated the problems by giving examples.

Perth Oct 2006

When we were trying to implement an integrated EDRMS across a number of agencies, our first business case was not successful. It was external factors, eg State Record Act, Environment, E-Government that finally drove acceptance.

Perth Oct 2006

We implemented a centralised EDRMS across three agencies in three separate buildings. The executive team drove acceptance because they wanted access to documents in other buildings.

Perth Oct 2006

It was decided that we had to develop an RDMS after we were audited. There was a global RDMS in place, but our office wasn't participating. The management just thought it was a matter of putting an application on a desktop, and IT thought we just needed to switch it on. But we didn't have a thesaurus in place. We had to do a presentation to the executive team to persuade them to stop, develop a thesaurus, and then roll out. They accepted the findings and we developed the thesaurus and implemented successfully.

Perth Oct 2006

This was a project to build a coordinated classification model for the organization. We identified the stakeholders and tried to form groups to provide the information we needed. We were trying to amalgamate the responses and ran into problems. The project sponsor could not manage the responses, there was general outcry from the groups and the project closed down. The records management people then completed it, but were not allowed to show it to the company. But they are using it with new groups now.

Perth Oct 2006

This was the challenge of implementing a new intranet. We had a person who could update it, and identified software tools to do this. We developed a prototype and showed the manager and other stakeholders. We rolled it out with training in incremental steps, with support from the executive team. We assigned champions (volunteers). The end result was everyone could use and update the intranet, improved service delivery, increased productivity and raised morale.

Perth Oct 2006

We got support from the director general and money for records and archives training across the organization. We did presentations to managers and got support. Now we are 50% through after 3 years, and the managers are not backing it any more.

Perth Oct 2006