

"Assistance at A Distance"



Distance Consulting

by Fred Nickols

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Community of Practice

What It's Like Inside

Inside a Community of Practice

Introduction

Knowing about Communities of Practice (CoPs) and knowing what it's actually like to be part of one are two very different things. The term "Community of Practice" is foreign to most people. Most people who belong to a CoP don't think of themselves as members of a CoP. "Community of Practice" is a special term that was coined to refer to certain forms of social organization in the workplace. "Communities of Practice" are described in detail elsewhere in this Start Up Kit and so will be summarized only briefly here.

Our intent here is to convey a sense of what a CoP is like and how typical members view the functions and benefits of a CoP. Again, only personal experience will truly convey this sense; but by reading the brief vignettes and then tackling the questions that follow you will gain some greater comfort with CoP concepts and practices.

One More Time: What Is A Community of Practice?

A Community of Practice is a group of people in the workplace marked by a certain set of characteristics.

- **A Practice.** They have in common their work and a "shared repertoire" or set of practices for doing that work. In large measure, they define these working practices themselves. Defining their own work is important because company processes and procedures are often incomplete and sometimes dead wrong.
- **An Identity.** CoP members also typically develop their identities at work through their work, and these distinctive identities often trigger their membership in a CoP. Again, work is at the center of things. Thus it is that John comes to be seen in general as "really knowing his stuff," and Jane acquires a reputation as an "expert" in financial analysis, and Jerry winds up pegged as "the creative-but-unpredictable one."

- **A Joint Enterprise.** Finally, the members of a CoP have in common what is called a “joint enterprise.” This is the mission or objective they share. They are up to something, be it processing claims, troubleshooting copy machines, achieving growth objectives as a result of converting prescription products to over-the-counter products, or figuring out how to leverage the corporation’s buying power on behalf of hundreds of sites around the world.

Four CoP Profiles

CoPs are everywhere and they’ve been around forever in various forms and under different names. The best way to know what it’s like to be part of one is to *reflect on your own experiences*. Sometime during your career – and probably on many occasions – you’ve been part of a CoP. The chances are good that you are a member of one right now.

The questions that follow these profiles will help you explore your personal experiences, relating them to what is presented below. Following are four vignettes intended to help you reflect on your own experience and get past the new terminology to appreciate CoPs.

Division Financial Controllers

Joanne is head of finance and administration for a \$230 million division of a \$1.3 billion consumer products company. There are four others in her company with similar positions. They, along with their budget and financial analysts, the corporate controller and the VP of Finance, comprise a small group concerned with making certain that “the numbers come out right.” All report directly to the VPs of their divisions (with dotted line relationships to the corporate controller and the VP of Finance). Although only a handful of the members actually have the title of Division Financial Controller, the group is known as “the DFCs.”

A large part of Joanne’s work consists of making certain the budgets for her division are current. Although the budget work is taxing at times, it is the easy part of her job. Besides, the “budget reps” as they are known do most of the actual work. Accommodating requests and adjustments from “corporate” is less frequent but often much more demanding. Providing administrative support to six regional managers who dislike administration is difficult. Joanne, however, is very adept at “getting people to go along with the program” and is generally seen as the financial group’s expert when it comes to implementing changes in financial methods and procedures.

Joanne and her peers view themselves as guardians of the corporate coffers and enforcers of corporate policies. Holding people to budgets is important; so is making certain that financial data are accurate, complete, and reported in a timely and useful way. Finally, because their respective VPs are generally busy with non-financial business matters, Joanne and her colleagues view the central task of their positions as “staying on top of the finances.” For Joanne, this means providing advice and recommendations to her VP, sometimes in response to a request and sometimes at her own initiative (e.g., whenever she sees trouble brewing). Joanne would tell you that her regular interaction with her three peers – through occasional meetings, via e-mail, and their luncheons – is a natural way to learn from one another, share knowledge, and improve their individual effectiveness. We would tell you this is a functioning Community of Practice.

Consider, for instance, the following situation.

The users’ manual for the corporate financial system was originally prepared several years ago and has never been updated to reflect the many changes to the system. Instead, Joanne and her peers have figured out how to work with the changes to the system as they occurred. They all have individual notes and a few “cheat sheets” that they have prepared over the years but, for the most part, the ways they’ve worked out for using the evolving financial system are not documented anywhere. Instead, over lunches, via e-mails and in telephone calls, the changed and revised procedures have been passed from person to person. Greg, one of the budget analysts who works for Joanne, has developed many of these procedures and is generally considered the savviest of the group. Whenever people are having difficulty getting the financial system to do what they want, it is to Greg that they turn. Greg created many of the “cheat sheets” in circulation, either on his own or in response to a call for help from one of his colleagues. He is, then, at the center of this particular CoP. Consider, for example, the memo on the right, from the corporate controller to the DFCs.

See what we mean? The description above sounds a lot like life at work, doesn’t it? What is important about it is the presence of the three basic characteristics or qualities of a Community of Practice:

Memorandum

From: F. Henderson, Controller
To: DFCs
Date: August 1, 1999
Subj: Financial Report Q3

As some of you have pointed out via numerous e-mails and telephone voice mail messages, the third quarter financial report seems to be less than perfectly accurate.

Greg Wilson has been looking into the matter on his own and it is his opinion that the uploads from the current to the year-to-date files did not go well. Both databases are accurate but something happened during the upload. The systems people have been advised and they will re-run the upload over the weekend.

In the meantime, Greg suggests that you can import the year-to-date and the current quarter databases into your local spreadsheets if you simply can’t wait until next week.

On a related note, Greg has agreed to put on a demonstration of the various uses of pivot tables at the next DFC meeting.

Respectfully,

F. Henderson
Controller

- **Joint Enterprise:** In this case, stewardship of the company's finances.
- **Shared Repertoire:** The methods and procedures used by and also developed by the members of the group.
- **Identities at Work:** Joanne's reputation as a solid strategist and change manager, and Greg's reputation as "master" of the financial system.

Application Development Groups (ADGs)

Jack heads up a small team of programmers that is part of a much larger unit known as "IS&T" (Information Systems & Technology). Jack and his team are application programmers. They design and develop computer-based business applications. They, and the other small groups of application programmers in IS&T, see themselves as very different from those who work on the operating systems or the technicians who run the data center. All the applications programmers and analysts see themselves as "making things happen." To their credit, the operating systems group and the data center staff refer to themselves as "making things possible." They, too, have a sense of community and identities that derive from their work.

The most recent project tackled by Jack's group involved some web-based product knowledge distribution systems. Most of what they develop is done in Visual Basic and most of it is for Windows-based systems. They work hard, long hours and play hard, too.

Jack's job as lead programmer is easier because the programmers all view one another as very competent (although Louise is generally acknowledged as the "ace" when it comes to screen design). When an assignment comes their way, they generally sit down as a group and carve it up among themselves. Jack knows better than to "make assignments." His position as lead programmer pays a little more, which is why he took it, but he'd really rather "write code." The lead programmers in the other Application Development Groups (ADGs) feel much the same way. Making the machine "dance" is part of Jack's motivation and staying on the leading edge of programming know-how is another. Jack and the rest of his group know that their employability in the marketplace hinges on the currency of their skill sets and the nature of the applications on which they've worked. Consequently, Jack likes working in an environment where he can pick the brains of his team members and, from time to time, have his picked, too. Just the other day he helped Callie, one of the newer members of the team, figure out how a coding problem could be handled. This took place via a brief telephone call and the dialog went something like this:

Callie: Jack, I could use a little help with the coding for this new marketing expense allocation algorithm.

Jack: What seems to be the problem, Callie?

Callie: Well, we're supposed to be able to spread the expenses manually on a percentage or dollar amount basis. I can figure out how to do that for either one of those but I can't figure out a single routine that will do both.

Jack: One way would be to do the dollar amounts first and with those out of the way do the percentages. Or, you could do the opposite of that – do the percentage spreads first and then do the dollar amounts.

Callie: I know, Jack, that's not my problem. I don't want to have to write two routines, run one, update the database, and then run the other and update the database again. Besides, the specs call for being able to do either one simultaneously.

Jack: Okay. You can dump the database fields you're updating into an array, run a split screen, capture the intended changes – percentages and dollars – and then do the updates to the array and put that back in the database.

Callie: Ah, good idea. Let me go work on that for a while.

It is through interactions like these that know-how is transferred from one member of a CoP to another. Sometimes this happens in one-on-one interactions like the one above, sometimes in informal “water cooler” interactions. It is quite likely that what Callie learned above will be the topic of some other interaction and so this particular technique will make the rounds.

This relatively informal subset of the larger ADG CoP enables Jack and his team to share what they know, what they learn, and what they'd like to learn. Through e-mail, telephone calls and their quarterly ADG staff meetings, they stay in touch with the members of other ADGs and keep abreast of what's going on elsewhere in the company. Often, they're able to create “new knowledge” or new ways of doing things as a result of this ongoing interaction within their own small “community” and the larger ADG community as well.

Executive Assistants (the EAs)

Joyce is executive assistant to the VP of Planning & Development. She does all the usual things: answers the phones, answers the mail, manages her boss's calendar, sets up meetings, and so on. She is also a member of the EA Advisory Group, an assembly of some 30-odd executive assistants from all around the company. About half work for officers and the rest for other senior managers. They interact regularly in the normal course of doing their work, and they have lunch with one another from time to time in small groups of two to six. Once a month, they meet to discuss their work and the difficulties they encounter. Brought together initially by the VP of Human Resources for a corporate training program, the group decided to continue meeting instead of going back to business as usual. Joyce and a handful of others led the effort to continue the EA Advisory Group and they are seen as the natural leaders.

Joyce and her group have taken it upon themselves to ensure that secretaries and administrative assistants who are promoted to EA's quickly "learn the ropes," especially the unstated ones. This CoP's members encounter a steady flow of sensitive and confidential information in and out of their boss's offices. Joyce and her colleagues have learned over time to manage the sharing of this information judiciously among the members. It is a delicate skill, no doubt. Their VPs understand this dynamic and accept it. When something extraordinarily confidential crops up, the VPs take pains to make that clear to their EA's. These matters are then kept under wraps.

The culture of this CoP is communicated and learned via one-on-one interactions and various face-to-face gatherings, one of the most important of which is the Executive Assistant Advisory Group (EAAG) conference, a twice-yearly assemblage of the EAs. This is a half-day session meant to keep all EAs current regarding policies, issues of concern to the officers and any particularly useful job-related tips and techniques that are appropriately or better delivered in such a forum. For example, the agenda for the most recent EA "gathering" as they are called, is shown to the right.

Agenda		
EA Advisory Group "Gathering"		
Wednesday, June 2, 1999		
Meeting Room 2B21		
0800-0830	Coffee, Juice & Pastries	All EAs
0830-0845	Review of Agenda	Joyce
0845-0900	New HR ID Policy	VP HR
0900-0930	Review of Shift to MS Outlook	Pete Smith
0930-1030	Demo of Selected NT Features	Karen James
	Break	
1045-1130	Discussion of EA Roles/Duties	All
1130-noon	Get Acquainted (new EAs)	All

The Officers

As VP of Operations for an old-line life insurance company, Janet has overall responsibility for the processing of policy applications, claims and inquiries. In this role, Janet is “the boss” to the people of Operations. But, as an officer of the corporation, she has certain fiscal and fiduciary responsibilities that go beyond her own area. She’s part of the management team. Unlike Peter, who heads up the systems area, Janet is viewed as a solid operations chief and a good businessperson. Peter, unfortunately, is viewed as an “empty suit” and is widely thought to be targeted for replacement. As a group, the officers have varied backgrounds. Gerry, the CEO, is widely regarded as a product development genius. Rich, the EVP of Marketing has been in life insurance sales and marketing for 25 years. Gwen, Corporate Counsel, has the expected legal background. Howard and Larry, VPs of Sales for the Eastern and Western regions respectively, have been “peddling policies” as they put it, for most of their working careers. Fred, the EVP of Finance & Operations – and Janet’s boss – is an old friend of Gerry’s and has worked as “No. 2” to the CEO in at least three different companies.

This diverse group of role players shares a singular goal: grow market share. Even profits are subordinate (within reason) to the goal of increasing market share. What they’ve all learned in the three years that they’ve been working together (and learning how to work together) is that they must work together. For this reason, Janet suggested to Gerry that a closer working relationship between her Operations group and Peter’s Systems Group was vital to the success of the kind of high-speed, new product development and roll out strategy he sees as essential to capturing market share. The aim of working more closely led to the establishment of a small subset of officers known as “SysOps,” consisting of Janet, Peter, Gerry and Rich. The group has the final say on all matters pertaining to priorities and resources for the processes that support product development and delivery. As expected, this has all but eliminated the “stovepipe” bottlenecks that used to hamstring quick, coordinated action – which all agree is essential to support a short time-to-market strategy.

What’s It Like Inside A CoP?

If you were to ask any of the preceding four characters (all based upon real people in real situations) what it’s like to be a member of a CoP, they would probably look at you and say, “Huh?” Or, they might ask you, “What’s a CoP?” But if you change the question slightly, you can gain some insights.

For example, if you were to ask Janet, “What’s the goal you and the other officers have in common?” she might well say, “Increasing market share.” Were you to ask her, “What skills or frames of reference do you and the other officers have in common and need in common?” she might say something like, “Well, we all need to be able to look at the financials of a proposal or proposition. We all need to consider the impact of our actions and decisions on the capabilities of the

company. We all need to listen for the impact on us of changes in other areas and we all need to think about the impact of changes in our areas on others. Most of all we need to have tolerance for and work with one another.”

Similarly for Joanne, Jack, and Joyce. We all are or have been members of one or more Communities of Practice (CoP) but we probably don’t think about it in those terms. However, in today’s environment the CoP is becoming a high-value organizational entity. Senior managements recognize and support such groups in the form of training, access to expertise, funding, technology support, and other resources. Today’s environment makes it easier for CoP’s – under any name – to learn and to share with others who have common interests. In the process, benefits accrue to the members, and to the company.

So even if CoP’s seem a bit foreign, we can examine our experiences and likely find instances where we were members of one -- even though we didn’t use that term. Here, then, is a set of questions intended to help you engage in that kind of reflection. Space is provided for notes, but there are no correct answers: the subject here is *your* experience.

1. What are some of the groups of which you were a member and in which the members all did roughly the same or similar work?
2. What were the “shared repertoires” of those groups (i.e., what were the work routines, methods, tools and procedures they had in common)? What portion of those came from corporate training and methods groups and what portion had to be worked out on the job? How did those things get worked out on the job?
3. Who were some of the “characters” in those groups? What was the work-related basis of their identities? What was your identity? Who was on the inside? Who was on the outside?
4. For each of the groups you listed above, what was the group “up to” (i.e., what overarching purpose or mission gave them all a common goal or direction)?

5. What did you learn while a member of that group? How did you learn it? What did others learn from you? How did they learn it?

6. What was the relationship between the groups you listed above and the formal organizational structure in which those groups were embedded? How were the formal and informal aspects integrated? Where and how did the formal and informal organizations interface and dovetail? What went well and smoothly? Where were the bumpy spots?

Conclusion

It's unlikely that you were able to quickly, completely answer all the preceding questions. However, they should have sparked some memories that gave you a grasp of a "Community of Practice" – a grasp that goes beyond just an abstract understanding and that engages your own experiences.