



▶ **Knowledge management and project collaboration:**  
Generating and harvesting knowledge with Instinctive eRoom



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instinctive<sup>e</sup><sup>™</sup>

## Summary and introduction

Here's the surprise ending: Instinctive eRoom is a superb environment for gathering distributed knowledge and generating new knowledge that can then be accessed via eRoom's own tools or handed off to systems that manage the other phases of knowledge management.

This white paper first looks at the nature of KM and then at how Instinctive eRoom fits in. Even if you are familiar with KM, we recommend that you read Part I because it presents KM in a somewhat different light, making it clear, why Instinctive eRoom supplies an important component missing from many KM systems.



# Part 1: Knowledge management

## 1. Why the KM buzz?

Considering that knowledge management is one of the most poorly-defined terms in the history of buzzwords, why the very considerable interest in it?

The fact is that “KM” has been defined in so many different ways because the set of problems it addresses are well known and deeply felt, although the solution to those problems is not as obvious.

### What problems? Oh, little ones like:

- People and teams are creating lots of valuable ideas and information, but it's locked on their hard drives or buried in the massive landfill that is most companies' information environment.
- Teams spend more time working on administrivia and coordination issues than they do on doing constructive knowledge work.
- With all the information companies hoard, they still don't understand what's going on in their business or their market.

Then there's the positive opportunity that's pounding on our door. The Web provides us all with unparalleled access to information and to one another. Although this new work environment may be too broadly distributed to be closely managed, we do need new ways to manage in the globally distributed workspace and information space.

In this mix of danger and hope, the phrase “knowledge management,” touched a nerve in many companies, even though they weren't sure — couldn't be sure — of exactly what the phrase meant.

Vendors and consulting companies rushed into the void with offerings of every sort. With all the brainpower expended on the challenge, it's not surprising that the market has now started to sort out the category, with many, many examples of real gains achieved via KM.

So, while there's still no obvious and agreed-upon definition of knowledge management, there's general agreement that KM enables a company to:

- Harvest and generate high value information, even in a globally distributed environment
- Identify and replicate its best practices
- Better understand the key issues facing it

A system that helps with these issues would truly achieve the real aim of any KM solution: making your organization smarter.

## 2. Characteristics of K

Ah, but what is knowledge? It's very hard to pin it down, but here are some of the key characteristics of knowledge:

- **Knowledge is important.** Whether it's important because it correlates significant market information, because it presents a startling new idea, or because it's the CEO's favorite theme, in any case knowledge is worth developing and having.
- Knowledge is important **because it has an effect.** It changes the way the business works.
- **Knowledge comes from groups** more often than from individuals. Most ideas emerge from conversations (directly or indirectly) among members of groups.
- **Knowledge is unpredictable.** There's literally no telling where it's going to come from. It's at least as likely to emerge from an interdisciplinary argument over email as it is from the lonely genius sitting in his office with the shades drawn.

## 3. Knowledge as a property of groups

Knowledge is a property of groups more than of individuals.

Ok, but why is that so?

Simply because there is too much information for any one individual to master. So, to be an expert in a topic requires you to specialize so narrowly that your expertise is only in one facet of what is likely a very large issue. Yet, the impetus behind KM is to get past narrow information and head towards some type of Big Picture understanding.

To achieve this, then, requires people to work together and share their expertise.

Thus, the information tsunami guarantees that knowledge is generally a property of projects and knowledge-based groups.



#### **4. The problem with distributed knowledge**

Projects and groups themselves are becoming highly distributed thanks to the Web.

In addition, the perpetual fragmenting of applications as new software packages are brought to market means that the information that people require is distributed across a wide variety of types of applications, from word processors to spreadsheets to email to discussions to databases and more.

These two types of distributions result in a multiplier effect because the knowledge you need may be in an unpredictable application in an unpredictable physical location.

The problem for knowledge management is that you need centralized access to this distributed knowledge base but you cannot hope to achieve this by centralizing the knowledge itself. Centralizing the knowledge would require the sort of centralized control that the Web makes virtually impossible. And counting on the individuals who create the knowledge to voluntarily upload it to some central area requires a highly optimistic view of human nature.

#### **5. Portals, projects and centralized access**

Two solutions present themselves.

One is to create a knowledge portal for your enterprise. This Web site acts as a central access point to a distributed library. There are large questions pending about how to locate all the required resources and how to maintain the portal itself, but as a global access mechanism for a corporation, portals make sense.

Another solution — consistent with a corporate portal — is to centralize access not just around the global interests of the corporation but around the actual projects underway. Projects represent the real, concrete interests of a business.

There's good reason to do this. Knowledge has value because it is relevant to a business interest. The projects underway are directly aimed at those interests. The people who need the knowledge — and, as we'll see, the people who create the knowledge — do so in the context of a project.



## 6. Knowledge and collaborative projects

Knowledge is especially likely to emerge from collaborative projects.

Knowledge can emerge from any of these groups, but it is most likely to emerge from a particular sort of group: collaborative projects.

A project is a set of people working together toward a shared goal, using shared tools and shared assumptions.

Clearly, there are many types of projects, but they all bring together a group of people who are pointed in the same direction. Some projects are task-based and centrally directed—a project leader assigns roles and deadlines, and cracks the whip to keep the team on time and budget. Other projects are collaborative—the team works out basic issues such as what needs to be done, who does what, in what order, and even sometimes what constitutes success. Collaborative projects tend to involve a fair bit of group discussion. (All projects combine elements of both types.)

### **The more collaborative the project is, the more likely that knowledge will emerge:**

- The groups involved in projects are the ones most likely to develop knowledge because they are clearly focused on clear business objectives. Their conversations (using the term broadly) are thus more likely to route around noise and have the spur of urgency.
- Knowledge is more likely to emerge in groups that are collaborative because in task-based projects, knowledge can be a distraction. Task-based projects by definition know where they're going and how to get there. Collaborative projects don't always know that. Thus, collaborative projects have to generate knowledge to succeed. And, frankly, the conversational latitude permitted in collaborative projects is better soil for the growth of knowledge.

It is hard to find a collaborative project—except perhaps one that's failed miserably—that hasn't generated a significant amount of useful knowledge.

## 7. The knowledge lifecycle

Various consulting groups have made a good living by branding versions of the Knowledge Lifecycle. But it really comes down to something quite simple:

**Generate → manage → share**

Now, it's easy to make this more complex. In fact, without a lot of work you can turn it into the highly desirable Knowledge Cycle Diagram that every industry analyst likes to show because it conveys the impression that KM is some type of perpetual motion machine, generating value out of itself. But the basic shape of the lifecycle is really quite simple and incontrovertible.

Just as there are two basic types of project (task-based and collaborative), there are two basic types of KM which we shall loosely call “formal” and “collaborative.” Each fleshes out the steps of the KM cycle rather differently:

	<b>Formal</b>	<b>Collaborative</b>
Generate	Data mining, Semantic analysis	People conversing, brainstorming, problem-solving
Manage	Devise schema, apply meta-tags, store in database	Provide discussion areas, organize materials, manage document versions, enable decision-making via voting, etc.
Share	Create full text index, topical index, browsable hierarchy	Organize, publish and recommend

Clearly, there is ample room for both types of KM and most organizations will have some combination of the two, the ratios determined by the nature of the business.

### 8. Instinctive eRoom — a refresher course

Instinctive eRoom is an innovative system for creating and managing collaborative projects.

Using a Web browser or dedicated client, the members of a team can log into a project space that enables them to share documents, engage in discussions, manage task lists, and get their collaborative work done.

#### Here are some of its features:

- *Common work area* — A shared view of the materials that are the knowledge base of the project.
- *Version control* — Presentation of the latest and greatest version of any documents (or any other objects) in the common work area. You can also see and comment on previous versions if you want.
- *Routing* — Move a knowledge object from one person to another so it can fulfill its destiny.
- *Discussions* — Threaded discussion manager enables a group to carry on a conversation and others to find it and learn from it in the future.
- *Tracking lists* — Lists of various types so the group can chart its progress.
- *Notification* — Let the group know when members have contributed to the project space — connecting people's personal workplaces with the team's project workplace.
- *Decision tools* — Enable the group to come to decisions via votes and polls. Record those actions for posterity.
- *Search* — Find information in any work place you have permission to see.
- *Administrative tools* — Everything the group needs to run itself. It's crucial to the group's productivity that this not require getting on the corporate system administrator's schedule.
- *Customizable home page* — Every work place for every project should be able to have its own character.



- *Meta tags* — Objects in an eRoom can be tagged with meta information that makes it useful to other applications that want to be able to act on or classify the object automatically.
- *People profiling* — The group can identify experts and other resources by searching through people profiles maintained by the system.

And, of course, all this accessible through any standard web browser.

The result is that distributed workers can engage in rapid-cycle projects very easily and efficiently.

## 9. Instinctive eRoom and the KM Lifecycle

Remember the KM lifecycle?

**Generate → manage → share**

Perhaps surprisingly, the first phase is the one least addressed by current KM solutions: according to the Gartner Group, knowledge capture is the least mature of all the steps.

That's where Instinctive eRoom comes in:

- Knowledge, distributed by nature, is gathered in and for collaborative projects.
- Knowledge is most easily generated in collaborative projects.
- Instinctive eRoom is a unique tool for enabling and managing collaborative projects.
- Therefore, Instinctive eRoom is a superb collaborative knowledge generator.

## 10. Harvesting knowledge

Instinctive eRoom gives you two ways to harvest the knowledge collaborative project teams generate inside eRoom's webby walls.

First, for those using eRoom, there are a set of tools that make the information generated in other projects readily accessible to them, including powerful searching that works across multiple projects and data types.

Second, Instinctive eRoom has a set of "connectors" that enables knowledge easily to flow to KM systems that manage and share knowledge across the organization. The first connector available enables a user to right-click on any object in an eRoom and send it to Microsoft Exchange; other connectors are on the way. The connector includes the assigning of the appropriate metadata tags so that the recipient KM system can manage the object appropriately.

Connectors make it easy for collaborative groups to share the fruit of their labor, integrating Instinctive eRoom into enterprise KM systems.

## 11. Tasty knowledge

Connecting to a KM system is, by itself, not interesting. It's only interesting if the knowledge being generated is itself useful. There are reasons to think that the knowledge that emerges in eRooms is likely to be of high value.

First, it has undergone group consideration, so it is more likely to be of real value, as opposed to relatively random contributions from lone individuals whose material goes through no peer consideration at all.

Second, eRooms are often "templated" in organizations using them to develop best practices. Thus, the process by which the knowledge is generated is itself qualified.

Third, because eRooms are so easy to use, a wide variety of material at various stages of development can be shared in a distributed environment. All the tools required for group discussion and consideration are at the members' fingertips, so the environment provides a strong balance of ad hoc, creative, collaborative and structured possibilities. Ideas and knowledge of all sort can easily take root... and be winnowed.



## **12. Stop the presses! Instinctive eRoom is not a KM solution!**

We here at Instinctive are proud to be one of the handful of companies that has not re-fashioned itself as a KM company.

We are a software company that makes collaborative project management systems of which we are, frankly, quite proud.

On the other hand, we've watched KM grow from a hole of need into quite useful solutions.

Collaborative project management has an important role to play in KM systems, for collaborative projects are the richest field for developing useful, creative, peer-checked knowledge.

With our new connectors, Instinctive eRoom becomes a high-value part of KM solutions, addressing the very area — knowledge generation and gathering — industry analysts identify as most pressing.

It's not surprising. After all, collaborative projects are how businesses pursue their real interests. That's where you'd expect knowledge to come from and where you certainly want it to go to.

The collaborative use and development of knowledge. It's one way of saying what Instinctive eRoom is all about.

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