

The Accidental Knowledge Manager

To get people who never asked for the responsibility to embrace a KM project, top management must lead the way.

By Peter Dorfman

A corporate knowledge management initiative can have many unforeseen effects on management and staff. At one site, knowledge workers will welcome the effort, anticipating the benefits and pitching in as both users of and contributors to the knowledge pool. Yet at another site in the same company, the KM project may meet with skepticism and confusion.

At one large retailer that launched its KM program three years ago, the response was a quiet revolt. "We were plotting its downfall," recalls a veteran of that experience in the IT department's help desk group. "We agreed among ourselves not to use the tool or submit content to it. I eventually began to soften, but my buddies were actively trying to sabotage the project."

It's not hard to see why this company prefers to remain anonymous. What could produce such a hostile response to a progressive management initiative? In this case, the primary problem was stunningly bad communication. Relations between the support team and management already had been deteriorating for some time before the project began. Consultants began showing up for closed-door meetings with executives. By the time management asked the support staff to work with the consultants, rumors were flying. "We sincerely thought management had a plan to get rid of tech support," the former staffer says. "We felt they were going to take our knowledge and then dump us."

The KM project was eventually accepted, but a number of the covert saboteurs, who under different circumstances might have been essential contributors to the project, left the company, taking their knowledge with them.

Blueprint for failure

This unfortunate example is extreme but not unique. In many organizations, top managers conceive a KM project, then drop its execution into the laps of supervisors and knowledge workers who are at best incompletely trained for it. Like the help desk agents, those people become accidental knowledge managers (AKMs), to borrow the title from Anne Tyler's novel *The Accidental Tourist*, about a popular travel writer whose secret of success paradoxically is that he hates to travel.

Too often, KM projects are imposed on people who have other jobs to do and whose performance is measured against objectives unrelated to their new responsibilities in authoring and using knowledge. KM essentially just happens to them. They are expected to fashion their own roles in the initiative and are given little or no guidance, training or documentation. They may be saddled with sketchy expectations, undocumented processes and no benchmarks against which to measure success. As a result, knowledge workers resist the initiative. They worry that if they spend time managing knowledge, their careers will suffer.

Most supervisors recognize that their direct reports are right to be concerned. And they know that when their people underperform, the supervisors' own performance measurements may be negatively affected. When more conventional employee performance metrics fall off, they tend to back away from enforcing the knowledge authoring mandate. When this happens, the knowledge workers are happier, but KM objectives stop being met.

Driving Smart

One company that has had success in avoiding knowledge management accidents is Enterprise Rent-A-Car. Based in St. Louis, the company employs some 40,000 people, operates over 4,500 rental branch offices in the United States, Canada, the United Kingdom, Ireland and Germany, and has a fleet of more than 500,000 vehicles.

Its field support department provides support for technology-related problems to all Enterprise employees worldwide. Deanna Harris, assistant vice president for technical support, who has run the department for six years, began KM efforts three years ago. "We understood the value of capturing and sharing knowledge," she says. "Support people were needlessly reinventing solutions to old problems. We knew we could reduce our overall costs and improve operational efficiency by removing the need for these redundant efforts."

At the start, Harris found that employees wanted tangible evidence of the value of the initiative. "From the beginning we needed to get everyone together and develop a KM solution as a team," she says. "You have to break it down to specifics, phases and tactics and show people exactly what's in this for them."

As in most organizations, there was trepidation about change. Some customer support analysts (CSAs) feared that management was attempting to change their mission from being a help desk to being merely a call center, where they were expected to read solutions from cue cards and pass along anything complex to more experienced technicians. "Our biggest challenge with this initiative was buy-in: to get the people to believe, to participate and to share their knowledge," Harris recalls.

Aided by a team of employees and consultants from LaBounty & Associates Inc., she worked to open lines of communication about the real direction of the KM implementation. Harris chose Todd Kreuger, then manager of

Even the best-intentioned executive or management team can inadvertently create accidental knowledge managers. To take the accidents out of a knowledge management initiative, they need to understand what their worthy idea will put folks through. For either audience, here are some ways. Some examples follow from KM projects in customer support, but the issues they depict could arise in any business environment where people are hired for other skills but asked to take on these new responsibilities.

Clarifying the aims

Although it's unlikely that management's objective in developing a KM project is to reduce headcount, the intention may well be to get more out of people while they're there. It also may be to enable the organization to cope more gracefully when people leave on their own. Customer support agents, for example, remain in any one position for an average of little more than a year. Management wants the rest of the team not to have to relearn everything that a particular agent knows after he or she moves on. In this field, other typical motives for KM initiatives include increasing customer satisfaction with services, enabling staff to handle a wider range of issues, shortening the durations of calls and reducing the escalation rates of problems. The rationale for each of these objectives is straightforward. Each can be measured in some way, and each has an obvious bearing on quality of service, customer satisfaction and team productivity. But these goals aren't self-evident, and management has to articulate them to the people expected to achieve them.

A key tool for communicating this message is the mission statement, strategic plan or project charter. If the initiative doesn't have such a document, whoever has overall responsibility for the initiative must make sure that it is created. All significant players in the initiative should help to draft it.

Next, get key participants to look at the objectives through the lens of their own experience. The accidental knowledge manager often is the first to spot a mismatch between reality and expectation; goals that make sense in the abstract may be absurd in practice. Take, for example, the notion of shortening the durations of calls. An agent who has extensive, pertinent knowledge at hand can retrieve the answers to many questions in seconds, deliver them to the caller and move on--or so the theory goes. In fact, answering the question may be only the first step in a lengthy discussion of how to execute the solution. A quick answer satisfies the customer, but it often leads to longer transactions, not shorter ones, as emboldened customers try to find out what else the agent knows.

If an AKM can't bring issues like this to the attention of the project leaders, the organization has problems that will hobble any knowledge initiative. In fact, one of the most common stumbling blocks to successful knowledge management is poor vertical communication. Peers may interact comfortably with each other, but invisible walls exist between managers and their subordinates or between Tier One and Tier Two analysts in tiered service organizations. These kinds of barriers erode confidence and spawn negative rumors.

Pay for what you get

Not every organization succeeds in balancing the productivity objectives for KM with the requirements of knowledge workers' core jobs. If people are going to devote time to knowledge authoring, that time has to come from something they're doing now, such as managing cases or talking to customers.

Over time, capturing and sharing knowledge should make your staff more productive and make it easier for them to manage their time. In the short run, however, time conflicts will be a daily issue, so leaders must empower their people to document these clashes and to make the case for different ways to accommodate both the knowledge initiative and their main responsibilities. If they become willing to step up and be agents of change, it will show the organization at large that your team has an important role in managing the company's intangible assets.

You can't always be democratic about this. If you need heroic contributions to make the initiative successful, be firm. But be clear about what is expected and what the incentives for

quality assurance in the field support department, to drive the effort. Kraeger and the consultants developed a program to give everyone in field support a personal stake in the success of the project. They identified five core domains, tightly defined areas of technology for which field support teams were responsible. They built a team to generate knowledge for each domain, making sure that each team was built around a subject matter expert (SME) from the engineering group and included members from all three tiers of the service organization. The process included two days of intensive communication among all group members.

Each team sequestered itself to discuss the basic diagnostic logic that a typical Tier One CSA would use to troubleshoot a problem in a particular domain. Each team created flow charts of this logic and from them built decision trees to represent the knowledge.

For each class of problems, a team had to capture the knowledge a CSA would need to take the most effective steps to resolve an issue for Enterprise employees in rental branches. But the interactions among team members also demonstrated what was going to be required of the SMEs to generate that content. It illustrated, for example, the need for style conventions. And it showed team members at all levels the key role that Tier One analysts would play in identifying new issues or revisions to be documented in the knowledge base.

In short, this team experience eliminated ambiguities in the roles of employees in the processes of knowledge creation, administration and publishing. Management's objectives became clear, and knowledge contribution has now become a recognized part of the job at all levels of field support.

A defining moment came when the team members--both those who were to author the knowledge and those who were to use it to assist customers--saw the pilot knowledge bases go "live" for the first time. They were able to see the results of what had been an intensive manual process in the form of a software solution; they could follow the diagnostic steps of the tool, arrive at valid solutions and see their own logic accurately reflected in the system. As a result, trust developed rapidly in both the knowledge base and the

and benefits of success will be.

Many knowledge workers have the potential to rise through a series of increasingly responsible and lucrative jobs. Still, if you are asking them to contribute to a knowledge base from which their peers and successors can extract and use their collective wisdom, resistance is natural. In response, it makes sense to point out that you are simply trying to deal with losing them eventually.

You are making significant demands on these accidental knowledge managers, and they deserve some kind of specific recognition for this. Recognition frequently takes the form of incentives, which can be intangible rewards such as comp time for extraordinary hours spent in authoring knowledge or the privilege of reserving "protected time" away from the regular demands of the job to spend contributing to the knowledge base. Tangible incentives for contributions at some specific level of diligence can be attractive items such as dinners or music CDs as well as cash.

Such incentives do not necessarily have to be lavish. Darrell Johnson, customer support manager at Cutler-Hammer, a Pittsburgh-based electrical components manufacturer, has administered incentive programs for knowledge authors and administrators. He suggests that incentives be awarded for well-understood reasons and as publicly as possible.

Incentives work best when they are tied directly to the accomplishment of specific objectives, but more general rewards can also provide motivation. Every KM project is really a succession of phases, ideally punctuated by small, recognized, interim successes. Celebrate these successes. At the end of the first phase of a recent initiative at Enterprise Rent-A-Car (see the sidebar "Driving Smart"), consultants noted that the knowledge workers involved had often kidded about being involved in a "battle" and having collected "war stories." During a convivial wrap-up meeting, their supervisors handed the participants military-style medals and certificates identifying them as "knowledge management veterans."

Knowledge management is still a new discipline. The leader of a project may be as naive about it as the knowledge workers who are drafted into it. By recognizing that they have become accidental knowledge managers, participants can identify the mismatches between the demands of the new project and the way their conventional work is managed and evaluated. Along the way, they help to put drifting knowledge initiatives back on a productive course.

Peter Dorfman is founder and president of KnowledgeFarm, a KM consultancy in Lebanon, N.J.

team implementing it.

Now knowledge authors who submit solutions create a "ticket," just as they do when a field support customer reports a problem. They can track what happens to their submissions from the day they are created until they become generally available.

This is classic bottom-up knowledge management; the KM team developed the system, but the authors have the ownership required for it to work. There is a clear understanding between the CSAs, their supervisors and management as to when analysts can block out time to work on authoring content, so there is no conflict with their phone time. "It has been a tedious three years, but the benefits of KM to our customers, to employee morale and to our operation have been worth it," Harris says.
--P.D.

Accidental Knowledge Managers Speak Up

KnowledgeFarm has conducted an informal survey of technical professionals who view themselves as accidental knowledge managers. Among the 47 respondents, 63 percent said they were involved in their company's internal help desk, external support or IS management. As for their status in the company, 41 percent identified themselves as a team or project manager, 21 percent as a support analyst and 10 percent as executive management. The remaining 28 percent included consultants, engineers and others.

Virtually all respondents viewed themselves as important players in their KM projects: 34 percent said they run the project day-to-day, 24 percent developed the strategy for KM, another 24 percent initiated the project and 10 said the project depends on their participation. The remaining 8 percent make significant decisions or participate regularly in the KM effort. (Percentages have been rounded off to the nearest whole number.)

Among other things, respondents also commented on their outlook, their sense of job satisfaction and security, and the ultimate

outcome of the project. Of particular interest given the "accidental" origins of their involvement in the project are the respondents' personal feelings of satisfaction, accomplishment and frustration, as revealed in the graphs below.
--P.D.

[Personal Impact of KM](#)

[Sources of Stress for Participants](#)