"Bridging the Gap from Theory to Outcomes" *Volume 4, Issue 15, Autumn 2010*

In This Issue

TIPS AND TRICKS

Want to be more efficient during your work day?

1. Before you open your e-mail or check your phone messages, take time to plan your day.
2. Keep your desk and office organized.
3. Read only the important e-mails.
4. Take breaks and eat lunch.
5. Use technology to your advantage.
6. Do productivity checks.
7. Question everything.
8. Work during your prime time.
9. Don't allow impromptu meetings.
10. Schedule meetings with staff.

Want more info about these points? Go to:
http://www.gaebler.com/How-to-Be-More-Efficient.htm

Got a tip? Share a tip!
Send it to info@rimsolutions.ca and we'll include it in our next newsletter.

Mary Colak, CMC

A combination of client work and volunteer work, and the fact that I felt compelled to put in equal amounts of time into both took me 'offline' for almost a year. Crazy? Maybe.

As a result of not paying attention to my newsletter and availability of RIM courses over the past year, I now wonder if you, my reader, are still with me. I hope so, because I've got some exciting news to share with you.

During the past year, I have been inundated with requests about when my courses would be offered and if they would be offered in specific cities around the province. I'm happy to say that this may not be an issue any longer.

This month, RIM Management Consultants is launching the first of its records and information management training courses—ONLINE. You no longer need to wait to attend a course because now you can take it in the comfort of your own home or office, and for a fraction of the price. It's the same great content, modified slightly to fit an e-learning environment. To make up for the missing classroom interaction in the e-learning courses, you will have access to blogs and online Q&A.

To my faithful readers, I apologize for the disappearing act and thank you for your loyalty. To my new readers, welcome.

Best wishes,

Mary Colak, cmc

Boosting the Productivity of Knowledge Workers

SEPTEMBER 2010 • Eric Matson and Laurence Prusak
Source: McKinsey Quarterly

The key is identifying and addressing the barriers workers face in their daily interactions.

Are you doing all that you can to enhance the productivity of your knowledge workers? It's a simple question, but one that few senior executives can answer.

Their confusion isn't for lack of trying. Organizations around the world struggle to crack the code for improving the effectiveness of managers, salespeople, scientists, and others whose jobs consist primarily of interactions—with other employees, customers, and suppliers—and complex decision making based on knowledge and judgment. The stakes are high: raising the productivity of these workers, who constitute a large and growing share of the workforce in developed economies, represents a major opportunity for companies, as well as for countries with low birthrates that hope to maintain GDP growth.

Nonetheless, many executives have a hazy understanding of what it takes to bolster productivity for knowledge workers. This lack of clarity is partly because knowledge work involves more diverse and amorphous tasks than do production or clerical positions, where the relatively clear-cut, predictable activities make jobs easier to automate or streamline. Likewise, performance metrics are hard to come by in knowledge work, making it challenging to manage improvement efforts (which often lack a clear owner in the first place). Against this backdrop, it's perhaps unsurprising that many companies settle for scattershot investments in training and IT systems.

Since knowledge workers spend half their time on interactions, our research and experience suggest that companies should first explore the productivity barriers that impede these interactions. Armed with a better understanding of the constraints, senior executives can get more bang for their buck by identifying targeted productivity-improvement efforts to increase both the efficiency and effectiveness of the interactions between workers.

Among companies we've surveyed (see sidebar, "About the research"), fully half of all interactions are constrained by one of five barriers: physical, technical, social or cultural, contextual, and temporal. While individual companies will encounter some obstacles more than others, our experience suggests that the approaches to overcoming them are widely applicable.

Physical and technical barriers

Physical barriers (including geographic distance and differences in time zones) often go hand in hand with *technical* barriers because the lack of effective tools for locating the right people and collaborating becomes even more pronounced when they are far away. While these barriers are on the wane at many companies given the arsenal of software tools available, some large, globally dispersed organizations continue to suffer from them.

One remedy implemented by some organizations is to create "communities of practice" for people who could benefit from one another's advice—as the World Bank has done to help the 100 or so of its planners who focus on urban poverty to facilitate discussions on projects to upgrade slums. The communities feature online tools to help geographically dispersed members search for basic information (say, member roles and the specific challenges they are addressing) and sometimes use the latest social-networking tools to provide more sophisticated information, including whom the members have worked or trained with. By supplementing electronic tools with videoconferences and occasional in-person meetings, communities can bridge physical distances and build relationships.

About the research
This article summarizes the results of a research project under way since 2006. In the first phase, more than 200 knowledge workers at four organizations—the research institute Battelle, Educational Testing Service (ETS), Novartis, and the US Defense Intelligence Agency—kept daily logs of their knowledge interactions (more than 3,000 in total). Subsequently, we conducted field research and interviews with about 35 people at the original four companies plus three new ones: Ecopetrol, NASA, and Petrobras. For more on the first phase of research, see Al Jacobson and Laurence Prusak, "The cost of knowledge," *Harvard Business Review*, November 2006.

See Boosting Productivity on page 3

Boosting Productivity, continued from page 2

Social or cultural barriers

Examples of *social* or *cultural* barriers include rigid hierarchy or ineffective incentives that don't spur the right people to engage. To avoid such problems, Petrobras, the Brazil-based oil major, created a series of case studies focused on real events in the company's past that illuminate its values, processes, and norms. The cases are discussed with new hires in small groups—promoting a better understanding of how the organization works and encouraging a culture of knowledge sharing and collaborative problem solving. (To benefit further from such approaches, companies should include knowledge sharing in performance reviews and ensure that team leaders clearly communicate acceptable response times for information requests. The communities of practice described above can help too: employees are far more likely to give timely and useful responses to people in their network.)

Contextual barriers

Employees who face *contextual* barriers struggle to share and translate knowledge obtained from colleagues in different fields. Complex interactions often require contact with people in other departments or divisions, making it hard for workers to assess a colleague's level of expertise or apply the advice they may receive. Think of the disconnect that often occurs between a company's sales department and its product-development team over customer data. The two groups frequently struggle to communicate because they think and talk so differently about the subject (sales staff devote attention to customer insights while developers focus on product specifications).

To overcome contextual barriers, organizations can rotate employees across teams and divisions or create forums where specialists in different areas can learn about one another's work. The US National Aeronautics and Space Administration (NASA), for instance, holds a biannual "Masters Forum" to share knowledge across disciplines. About 50 employees from different parts of the agency attend the meetings to hear other NASA colleagues talk about the tools, methods, and skills they use in extremely complex projects. The sessions are lightly moderated and very interactive.

Similarly, managers at Ecopetrol, a Colombian gas and oil company, have found that technical forums not only break down the natural barriers between occupations but also facilitate knowledge sharing across geographic boundaries. Moreover, the forums build trust, which encourages employees to share information more freely.

The barrier of time

The final barrier is *time*, or rather the perceived lack of it. If valuable interactions are falling victim to time constraints, executives can use job roles and responsibilities to help identify the employees that knowledge workers should be interacting with and on what topics. In some cases, companies may need to clarify decision rights and redefine roles to reduce the interaction burden on some employees while increasing it on others.

Boston-based Millennium Pharmaceuticals, which develops drugs for cancer treatment, did just that. When it found that researchers didn't have time to share lessons from their experiments, it created a small group of scientists to act as "knowledge intermediaries." Based on meetings with company scientists as well as presentations, these employees summarize findings and submit them to an internal database. They also act as brokers by sharing knowledge across groups. The company reckons that this practice, combined with other initiatives, has boosted success rates for the company's research and reduced the time needed to make key decisions. ■

About the Authors

Eric Matson is a consultant in McKinsey's Boston office; Laurence Prusak is a visiting scholar at the University of Southern California Marshall School of Business and a former senior adviser to McKinsey.

Putting a Value on Training

JULY 2010 • Jenny Cermak and Monica McGurk
Source: McKinsey Quarterly

Training programs generate greater value for organizations when the curricula reflect key business performance metrics. Testing real-world outcomes is crucial.

All organizations train their people, and most spend significant sums doing so. Yet they generally don't have any idea whether they're getting any business value from training. Beyond teaching new employees the specifics of their jobs, most companies train staff in areas such as leadership, communications, performance management, or lean operations. But they typically measure training's impact by conducting surveys of attendees or counting how many employees complete courses rather than by assessing whether those employees learned anything that improved business performance.

This approach was, perhaps, acceptable when companies had money to spare. Now, most don't. Yet more and more, organizations need highly capable employees—90 percent of the respondents to a recent *McKinsey Quarterly* survey[1] said that building capabilities was a top-ten priority for their organizations. Only a quarter, though, said that their programs are effective at improving performance measurably, and only 8 percent track the programs' return on investment.

The story of one social-sector group, the Boys & Girls Clubs of America (BGCA), illustrates how organizations can make the most of their outlays for training programs by doing a better job of understanding which of them create business value, and how. The answers are remarkably straightforward and have lessons for retailers, manufacturers, and a range of other organizations as well.

What the Boys & Girls Clubs do

BGCA faced a common problem: a lack of capabilities in a core area—leadership—and a lack of funds to build those capabilities. Further, its donors were far more interested in financing programs directly aimed at children rather than "overhead," such as training. That made it imperative for BGCA to prove the performance impact of any training it undertook.

BGCA is one of the largest nonprofits in the United States. It acts as an umbrella for more than 1,100 local organizations and 4,000 club locations, which provide safe places for young people to learn and participate in athletic and life skills programs. The 1,100 local organizations manage their own resource development, strategic planning, programming, and fund-raising.

In 2007, BGCA found itself facing an incipient shortage of leadership capabilities. The organization has an ongoing growth strategy to expand the number of club locations but anticipated a wave of retirements among current local leaders. Using a capability model that appraised nearly 50 aspects of leadership, BGCA began to address the problem by undertaking a 360-degree assessment of every local leader. Regression analysis helped BGCA to correlate each aspect of leadership with local organizational performance on crucial measures such as growth in membership and funds raised—measures that it already tracked to assess the local organizations as a whole. Four out of the 50 aspects contributed disproportionately to performance: the leader's ability to build an effective board, find and pursue effective revenue-development strategies, use an investor's mind-set toward programs and resource development, and lead with personal tenacity and persistence.

BGCA therefore built its training program around those four subjects. The program involved both intensive classroom work and a project chosen by each local team; projects ranged from implementing new HR processes to deepening the impact of after-school programs. By the end of 2009, over 650 leaders from approximately 250 local organizations had been trained.

See Value on Training on page 5

Value on Training, continued from page 4

Because the program was designed to improve specific organizational-performance outcomes, the process of assessing its impact was straightforward. Where the leaders of local organizations had received training, BGCA compared their pre- and post-training results. More important, it also compared the post-training results against those of a control set of organizations, which had similar characteristics (such as budget size) but whose leaders had not yet gone through the training. The downturn in the economy, as well as preexisting economic differences among cities, complicated efforts to assess gains in membership and fund-raising on an absolute basis. With the use of these controlled pairs, however, BGCA was essentially able to screen out the impact of external factors (for instance, unemployment or differences in local educational-attainment rates) on membership and fund-raising. In this way, BGCA could isolate the effects of the training itself. Besides the quantitative analysis, BGCA used qualitative approaches, such as surveying local board members before and after the training, to assess the leaders' changes in behavior related to board leadership.

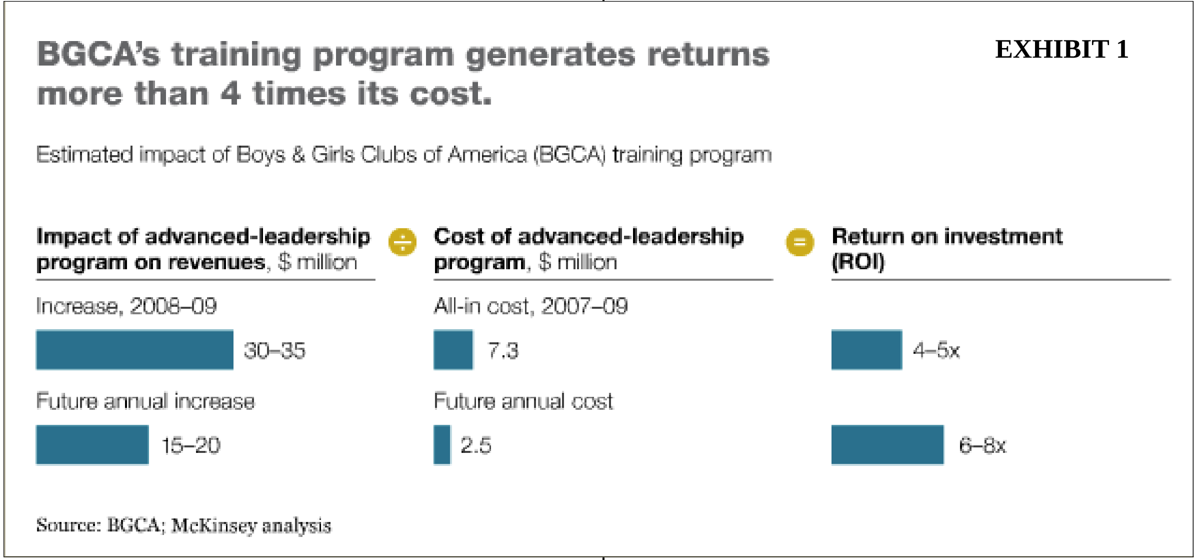
On average, locations where the leaders had been trained bested the control group on every performance outcome measured. If all 1,100 BGCA member organizations had matched the level of success achieved by the program participants, BGCA would see more than 350,000 new members and more than $100 million in annual incremental revenue—a 2 to 3 percent increase in the average location's budget, meaningful at a time of precarious funding. Moreover, BGCA determined that it generated more than a fourfold return on the program's costs, including the imputed cost of the participants' time, as well as travel and training expenses (Exhibit 1).

BGCA then compared performance gains among participants and found that the gains of participants in the highest quartile were three to five times the average (Exhibit 2—shown on next page). The high performers typically focused on very aspirational projects; set clear, quantifiable goals; and took the extra step of teaching what they'd learned to the rest of their organizations. Those insights led BGCA to adjust the training curriculum to reinforce the success factors.

Applying the lessons

Picking the right metrics is the key to creating real value from training. Most for-profit organizations have a longer list of quantitative business-performance metrics than BGCA does. A retailer pursuing better customer service and sales growth, for example, could train employees by getting its managers to provide real-time coaching and to role-model best-practice customer-engagement techniques. Rather than just measuring the managers' time allocation or employee-engagement data—as most would do now—the retailer should measure the impact of its programs through hard business metrics, such as sales, basket sizes, and conversion rates in critical categories or departments. Similarly, a manufacturer might try to improve its operations by teaching plant supervisors lean-manufacturing and coaching skills, but rather than tracking only how many managers have been trained, it should track metrics such as downtime, the overall effectiveness of equipment, or fill rates.

EXHIBIT 1



See Value on Training on page 6

Value on Training, continued from page 5

In every case, companies must continually review and revise the links between skills, performance, and training programs. Typically, to determine which metrics should be improved, companies assess their current performance against industry benchmarks or their own goals. Like retailers and manufacturers, most other companies know what kinds of skills are tied to different areas of performance. So a good next step is to conduct an analysis of the relevant groups of employees to identify the most important specific skills for them (as BGCA did) and which performance-enhancing skills they currently lack. To get a clear read on the impact of a program, it's crucial to control for the influence of external factors (for instance, the opening of new retail competitors in local markets) and of extraordinary internal factors (such as a scheduled plant shutdown for preventative maintenance). It's also crucial to make appropriate comparisons within peer groups defined by preexisting performance bands or market types.

By tying the curricula of training more closely to key performance metrics and then measuring its impact on them, organizations can generate greater value from training programs and find useful insights to improve programs constantly.■

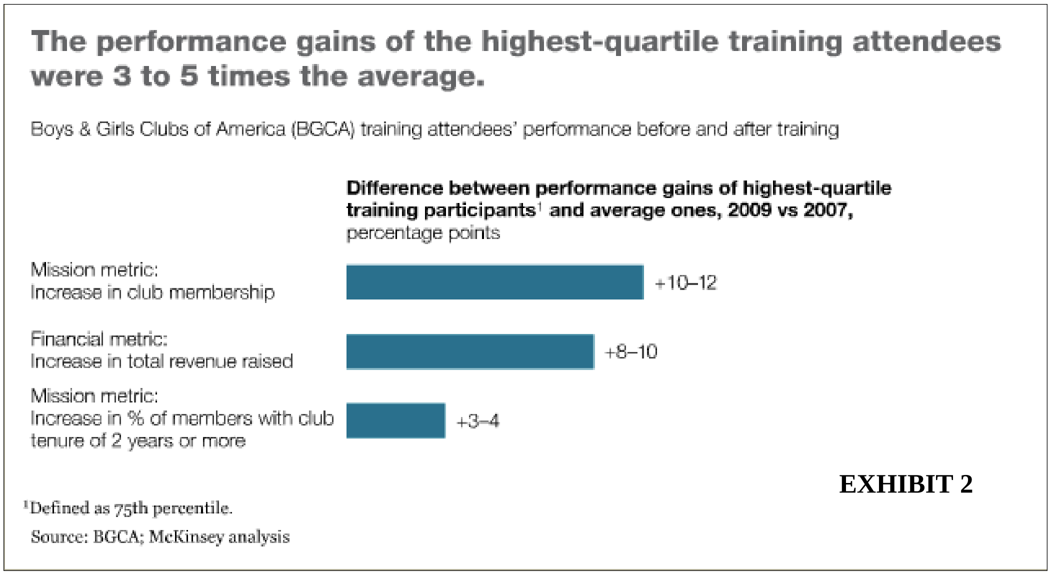


EXHIBIT 2

About the Authors: Jenny Cermak is a consultant in McKinsey's Atlanta office, where Monica McGurk is a principal.

"Remember, no thinking outside of the box!"

Peter Drucker and A.G. Lafley Want You to Be Curious

Source: Harvard Business Review,
12:50 PM Friday October 8, 2010
by Karen Dillon

What will you decide to be curious about Monday morning?

That's a question that former Procter & Gamble CEO A.G. Lafley routinely asks himself. For him, the willful decision to get curious about something new has led him to some amazing insights. For example, a few years ago Lafley wanted to get Peter Drucker's thoughts on the work of the CEO. So he decided to call the legendary management thinker out of the blue and see if he would be willing to meet. Drucker, Lafley recalls, answered his own phone and invited the relatively new P&G CEO to his home for a brief chat.

That living room chat ended up extending for hours and was the beginning of Lafley and Drucker doing some meaningful work together trying to define the work of the CEO. As Lafley recounted that first call when I interviewed him this week for the World Business Forum's New York conference, he was still ebullient remembering how much time and thought Drucker was prepared to share with him — a stranger until Lafley picked up the phone. Lafley's only regret was that he hadn't dared to call Drucker sooner in his career because their work, which continued over future sessions in Drucker's livingroom, was never fully complete in Drucker's life. Lafley would finish that thinking with an article in *Harvard Business Review* after Drucker's death, but he has wondered what else their collaboration might have produced had he called him sooner.

For Lafley, the curiosity imperative extends beyond reaching out to an admired thinker. His hallmark at P&G was to spend whatever time he could with customers, learning from them. As he advised a questioner in the audience at our World Business Forum session, don't wait to be given a customer research project — create one on your own. You don't need a big budget or lines of higher authority approval. Just do it. Decide to learn something new without anyone asking you to.

In my years of covering entrepreneurs, I know that many of the great ones were relentlessly curious, freely daring to reach out to people they thought they could learn from — even when it wasn't clear why those people would give them the time of day.

The moral of the story is that great thinkers and innovators make deliberate choices to be curious — and then dare to pick up the phone. Or email someone. Or start their own research project. Great connections that lead to game-changing insights aren't made randomly. You need to make "discovery" a priority project.

What journey of discovery is going to top your to-do list Monday morning? ■

Karen Dillon is the Editor of Harvard Business Review.

How to Fix Knowledge Management

Source: Harvard Business Review
October 2003
Author: David Gilmour

Companies should stop trying to capture knowledge and instead help employees truly connect.

It's time to abandon the fiction that knowledge management technology is working. Last year, U.S. companies spent $4.5 billion on software and other technologies that claim to foster information sharing among employees. Where's the payoff?

The problem is that most organized corporate information sharing is based on a failed paradigm: publishing. In the publishing model, someone collects information from employees, organizes it, advertises its availability, and sits back to see what happens. But because employees quickly create vast amounts of information, attempts to fully capture it are frustrated every time. Even the most organized efforts collect just a fraction of what people know, and by the time this limited knowledge is published, it's often obsolete. The expensive process is time consuming, and it doesn't scale well. Worse, it's retrospective: Companies make decisions about which information to capture based on what's been useful in the past. It's like using the rearview mirror to navigate the road ahead.

Even if all the right knowledge could be identified, the publishing model wrongly assumes that people are willing to share their most valuable knowledge equally and without some quid pro quo. The reality is that what employees say they know depends on who's on the receiving end of that information. People guard their information and selectively release it. This tendency to hoard knowledge is often cited as a core problem of corporate culture and the cause of poor collaboration. But, in fact, hoarding and meting out information result from an important positive impulse, the desire to appear valuable to the company.

Instead of squelching people's natural desire to control information, companies should exploit it. They should stop trying to extract knowledge from employees; they should instead leave knowledge where it is and create opportunities for sharing by making knowledge easy for others to find. This requires a shift away from knowledge management based on a publishing model, and a focus on collaboration management based on a brokering model.

Going for Brokering

A brokering model taps people's eagerness to share when there's something in it for them—particularly when sharing makes them visibly more valuable to their company. For example, if, unbeknownst to each other, two managers in different divisions are evaluating the same vendor, wouldn't they want to talk to each other and compare notes—especially if their successful connection was apparent to management? Or consider the executive in New York evaluating an acquisition and the plant manager in Michigan who used to work at the target company. These people would have a lot to share—if only they knew about each other.

The challenge for the brokering model, then, is to connect people who should be connected. One IT-based solution is to continually survey the flood of electronic information that flows through a company to learn who is likely to know what. Then, when someone needs information, those who have it can be asked privately whether they are willing to share. At Tacit, our software sifts through e-mail, network folders, and other data sources to identify common information threads. Our systems alert people about their shared interests without identifying them—somewhat like a dating service. That gives knowledge holders the opportunity to contact seekers directly or to confidentially decline contact. The systems also field queries. For example, an individual can ask whether anyone else is talking to the vendor he or she is considering. The parties can then connect or confidentially decline.

Our experience shows that brokering works best when people feel free to share the information they want, when they want. Technology should not flood people with information or take it from them; instead, it should identify connections that are valuable to the people that are being connected. Paradoxically, the more privacy privileges companies extend to employees in this process, the more they will choose to share. ■

David Gilmour is the president and CEO of Tacit Knowledge Systems in Palo Alto, California.

RECORDS AND INFORMATION MANAGEMENT RESOURCES

AIIM-The Enterprise Content Management Association—AIIM is the international authority on Enterprise Content Management (ECM) - the tools and technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM enables four key business drivers: Continuity, Collaboration, Compliance, and Costs. www.aiim.org.

ARMA International—is a not-for-profit professional association and the authority on managing records and information – paper and electronic. www.arma.org.

British Columbia Corporate Information Management Branch—CIMB provides central information management services and support to ministries, Crown corporations and agencies within the Government of British Columbia. CIMB is responsible for government recorded information management policy, standards and procedures. www.cio.gov.bc.ca/services/records/

Gartner—global leader in technology-related research and advice. www.gartner.com

Forrester Research—Forrester Research, Inc. is an independent technology and market research company providing advice to global leaders in business and technology. www.forrester.com

IDC—International Data Corporation—get the latest trends, surveys and forecasts. www.idc.com

ISO—International Organization for Standardization—check out the latest information on ISO 15489, the world's first standard for records management. www.iso.org.

Library and Archives Canada—Library and Archives Canada collects and preserves Canada's documentary heritage, and makes it accessible to all Canadians. This heritage includes publications, archival records, sound and audio-visual materials, photographs, artworks, and electronic documents such as websites. As part of Library and Archives Canada's mandate, they work closely with other archives and libraries to acquire and share these materials as widely as possible. www.collectionscanada.ca

Local Government Management Association of BC (LGMA)—LGMA is a professional organization representing municipal and regional district managers, administrators, clerks, treasurers and other local government officials in BC. www.lgma.ca

National Archives and Records Administration (USA) (NARA)—Of all documents and materials created in the course of business conducted by the United States Federal government, only 1%-3% are so important for legal or historical reasons. These documents are kept by NARA forever. Learn about NARA's record keeping standards. www.archives.gov.

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