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Best practices, case studies and strategy

The biggest wave of retiring workers is upon us and along with those workers will go immeasurable amounts of knowledge. Here, William Ives, Robin Athey and Adriaan Jooste dissect effective approaches to cope with tacit knowledge transfer, like “blogs” and less static social networking tools like “movies” to capture networking patterns and add sustained value.

NEW TOOLS TO LINK THE CHANGING WORKFORCE

Engaging generations with Web logs and social networking

By William Ives, Portals and KM, Robin Athey and Adriaan Jooste, Deloitte



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There's no avoiding it. The mass retirement of baby boomers, today's largest workforce, is looming. And to properly estimate the challenges this unique demographic poses, we need to understand the characteristics of each current workforce generation, the nature of work and knowledge transfer in today's economy, and the new collaborative tools available to meet these challenges.

The three generations

Nearing retirement: In 2008, those born between 1946 and 1964 will turn the effective average age of retirement across most developed economies. The workplace repercussions will be enormous. By 2025, the pools of labor in Germany, Japan and Italy will have dwindled by over 1 million. And if the US economy continues to annually grow at 1.5 percent, it will face a shortfall of 10 million workers by 2010. Some industries will be harder hit than others: government, healthcare, energy and traditional sectors of manufacturing face particularly strong blows. Automotive manufacturers anticipate losing over 40 percent of top management. Forty-five percent of the Canadian federal civil service is scheduled to retire by 2010. In the US, 60 percent of employees at NASA's Jet Propulsion Laboratory could retire today if they chose to. Also, the Australian healthcare system is grappling with 31,000 projected vacancies by 2006. As this generation retires, they will take rich knowledge

and experience with them – but they're not the only group representing significant turnover.

Mid-career professionals: Growing worker discontent in this sector may fuel additional job churn. Recent Gallup studies find that 80 percent of UK workers lack any real commitment to their jobs. Only 49 percent of US workers are satisfied with their jobs today compared to 59 percent in 1995. A recent survey from the Society for Human Resource Professionals found that 83 percent of employees plan to look for new work once the job market improves. In Australia, half of the participants in a recent survey by SEEK, an online job search site, indicated they were actively looking for new work. Ninety-six percent said they would consider switching jobs, depending on the opportunities offered. These numbers are at historical highs, considering workplace pressures, information overload, the pervasiveness of 24/7 technologies, change and growing uncertainty. Most worrisome is that the least satisfied are the 38-44-year-olds – those who should be taking the torches from retirees.

Younger workers: Compounding the turnover issue is a serious skills gap in younger workers. The problem seems particularly acute in the US where demand for workers with associate's degrees is projected to be twice the supply through 2008. The Discovery Institute predicts that 60 percent of

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future jobs will require training that only 20 percent of the current workforce possesses. The shortfall in science and engineering graduates is a case in point: only 198,000 students are available to replace over two million workers projected to retire by 2008. At the same time, the expectations of younger workers are shifting. This new generation seeks innovative technologies, a better balance of work and personal life, as well as a workplace openness that doesn't exist in many places.

So what can leaders do? The situation is complex, but common to all generations is losing experienced and effective people and facing the difficulties of developing incoming workers as the gap between skill supply and demand grows.

Traditional responses fall short

Unfortunately, remaining vestiges of the industrial revolution continue to influence management practices. People are still often seen as interchangeable parts. This rear-view thinking is now especially crippling. Just as work is becoming more knowledge intense, the largest generation of workers faces retirement. Yet the knowledge-retention strategies of many organizations suggest that you can simply extract knowledge from an older worker and implant it in a younger one, or archive their knowledge where it can be available for everyone's future needs.

Even in situations where the unique contributions of individuals are highly valued, efforts to capture knowledge often fail. Here are three reasons why:

- The knowledge worker most likely doesn't know how to communicate what he knows, or have the time or inclination to share what he knows. Even if he does, he can't anticipate what will need to be known after he is gone. Knowledge, among other things listed below, is social in nature, unlike data.
- Knowledge is context-driven. If organizations wish to keep knowledge in-house, they must generate seamless ways for people to share knowledge. People must have a compelling reason to exchange knowledge – and a shared mission – if they're to overcome personal and cultural barriers.
- Knowledge is personal. Mandates to share knowledge are likely to backfire, especially when there is nothing in it for the sharer. People are less likely to reveal insights if they're plunged into an archival black hole than if they're immediately useful to others. Distributed knowledge exchanges that operate as “free marketplaces for ideas” bring transparency to people's contributions. They separate the useful

- We need to understand the characteristics of each current workforce generation, the nature of work and knowledge transfer in today's economy, and the new collaborative tools available to meet these challenges.
- Mandates to share knowledge are likely to backfire, especially when there is nothing in it for the sharer. People are less likely to reveal insights if they're plunged into an archival black hole than if they're immediately useful and to others.
- Because they promote the personal voice, blogs also have shown to invite increased participation in work settings and corporate learning networks, supporting the extended capture of quality knowledge.
- Social networking tools can be used to identify who's likely to add value in cross-generational exchanges, and then monitor the health of these exchanges over time.
- All new technologies need to be aligned with significant issues and not simply be new toys in search of a problem.

from the useless, allow the personal voice of knowledge experts to emerge, encourage peers to push for clarity, and encourage dialogue from which true understanding can emerge.

Approaches and tools for today's realities

Enlightened efforts are emerging to more effectively deal with today's workforce issues. For example, *Lost Knowledge: Confronting the Threat of an Aging Workforce*, by David DeLong (see Q&A sidebar and book review on pg. 32) provides a number of practical approaches and a review of useful technologies to acquire, store and share knowledge. Here, we include two new collaborative tools and approaches: Web logs (also called blogs) and social networking applications. Like Communities of Practice (CoPs), these approaches stand out because they:

- Allow individuals to share knowledge within the context of their work;
- Permit the emergence of a personal voice;
- Encourage interaction, thus stimulating ideas and bringing clarity to their meaning;
- Bring transparency to people's contributions, allowing for recognition and immediate returns on their efforts.

Each of these tools offer the prospect of connecting the generations in ways that promote interaction that may not be occurring today.

The great untapped

Blogs have generally been associated with personal journalism but many leading-edge businesses are adopting them for other uses since they can store discussions in searchable archives. This allows multiple users to access content and identify key contributors. For example, such features can be particularly helpful for field service teams as they search past communications to troubleshoot new



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problems. Blogs capture knowledge and make it available for future use.

Because they promote the personal voice, blogs have also shown to invite increased participation in work settings and corporate learning networks, supporting the extended capture of quality knowledge. The personal voice also allows for an intimacy that enhances knowledge transfer.

When monitored and evaluated by peers, the best knowledge within blogs tends to rise to the top, allowing for a distributed marketplace of ideas. Providing this kind of transparency may be threatening to some organizations, but smart leaders recognize that benefits often outweigh risks when talent engagement is at stake.

One creative application of blogs is emerging at

the MIT Sloan School of Management, which seeks to better connect its alumni with the school by looking at the unique needs of each generation. As their CIO Al Essa explains, "A developmental cycle occurs in the life of most alumni relations that generates an evolving set of needs." This cycle progresses from a student's need to learn to an alumnus' desire to share the lessons of a lifetime of work. MIT Sloan connects the generations by providing a blog for each alumni class. They are also integrating blog capabilities into their Open Source e-learning tool, .LRN. Soon, they will invite experienced alumni to serve as virtual advisors to student teams tasked with solving real business problems. Corporations, in much the same way, can connect networks of alumni to younger generations within the context of real issues.

The right climate and the right tools for knowledge transfer

William Ives spoke with David DeLong, research fellow at MIT and author of *Lost Knowledge: Confronting the Threat of an Aging Workforce*.

What is an effective way an organization can better connect their workforce generations?

NASA implemented a storytelling initiative where retirees and those close to retirement provide stories about their careers designed to pass on their passion for space exploration to younger generations. Three things make this successful. First, there is a clear objective for the sessions, transferring an excitement about their life's work. Second, these events occur at regular intervals, becoming part of the workplace routine. And third, careful attention is paid to the packaging of the content for future audiences who could not attend the live sessions.

Are there other examples?

Yes. A global metals refinery took this NASA packaging a step further by using a tool devised by the software company PHRED Solutions, which provides a guided approach to capturing and archiving the results of similar cross-generational exchanges around plant operations. This allowed them to uncover root causes for problems and better frame solutions for future use.

Skandia, the Swedish insurance group, created a Futures Center that consciously brought together different generations in problem solving, so younger generations could see the thought process of more experienced workers and come to appreciate what they could offer, and vice versa.

How do you know when a tool is doing all it can do?

It's critical that the culture is in place to recognize and reward knowledge sharing. One recent retiree told me that he carefully transferred all the essential steps in updating a key database so his firm never missed a deadline after he left that position. As a result, he said no one in management realized the full value he brought to the firm. His worth would have been more appreciated if things had fallen apart after he left. We need to make sure this doesn't have to happen.

What is the most important lesson learned to keep things going in the right direction?

You need to make the generation gaps visible and discussable so managers can clarify the challenges they present for sustaining performance in the future. Part of my objective in writing *Lost Knowledge* is to raise awareness of the threats posed by baby-boomer retirements and to get a dialogue going that will lead to solutions.

Social networking brings generations together

Social networking tools fall into two categories – those that support social networks and those that analyze them. The most widely known tools promote personal social networks. While dating tools seem to capture venture capitalists' attention, enterprise applications are emerging that promote the quality of relationships, rather than quantity. One early example is provided by the Deloitte Alumni Network, which connects former employees, retired partners and colleagues still inside the firm. Beyond the networking tool, participants in the alumni network can participate in online discussion forums for more targeted communication. Both of these services offer an excellent platform for cross-generational learning, while fostering community among groups with shared interests.

Social networking analysis (SNA) tools have a different objective: to analyze the communication and networking patterns among individuals and groups. Most enterprise SNA tools are static. That is, they take a snapshot to determine how information, communication and trust flow within and across networks of people. However, dynamic tools are also emerging. An excellent example is the Open Source Collaborative Knowledge Network application being developed at MIT's Center for Coordination Science. This tool allows you to record movies that capture networking patterns over time. It can spot functional and dysfunctional networking patterns and locate the individuals who serve as network "hubs." In this context, it can also be used to identify who's likely to add value in cross-generational exchanges, and then monitor the health of these exchanges over time.

The power of tools like blogs and SNAs comes more from how they're used than their inherent

capabilities. Like all new technologies, they need to be aligned with significant issues and not simply be new toys in search of a problem to solve. For example, a leading financial institution has explicitly recognized the need to identify connectors, experts and knowledge brokers as they seek to improve knowledge sharing in specific key processes. This goal provides a solid business context for applying new approaches like blogs and SNAs.

Key questions going forward


A number of questions need to be addressed to achieve this alignment and fulfill the promise of blogs and Social Networking Analyses (SNA).

- Generation gaps are often exacerbated by differences in values and language. What exercises can organizations adopt to help participants navigate differences with respect – and thus bridge the gap? First, it’s important to design pre-emptive interventions up front, rather than let conflict play itself out before responding. The choice of intervention depends on how dependent individuals are upon one another, how frequently they must work together, how many are involved, and how crucial their collaboration is to business outcomes. If a partnership between a senior and junior engineer runs awry, for example, then focused counseling may be in order. In situations where many people across several generations must work effectively together, then facilitation may be helpful to get the ball rolling. Large-scale interventions may be used, but in any scenario, individuals must be truly committed to the process and share common goals. Technology can also be helpful. SNA, for example, can help leaders to detect whether a generational issue truly exists. It can help you to recognize, for example, whether people are aggregating together according to age, or whether trust breaks down between age groups.
- How can blogs and social networking tools be aligned with organizational goals so users migrate to them to achieve individual goals? These tools can be implemented in a two-pronged method. One is experimental and open-ended (as described in response to the next question). The other is specifically aligned with a key business process, like using blogs to record team activities to provide a searchable archive of solutions, or using social networking tools to determine if team communication is effective or dysfunctional. These latter, more focused uses are created like how process-aligned KM efforts are designed, through careful alignment with relevant aspects of the business process.

A seven-step action plan for the future

Every organization will have unique aspects that require specific solutions. Here is a high-level list of actions to devise a plan for your organization.

1. Understand the magnitude and nature of issues when it comes to your own workforce.
2. Identify key knowledge and skill areas crucial to organizational success.
3. Map the location of these current knowledge and skills areas and use tools like expert locators, expert mapping, and social networking analysis.
4. Create a knowledge succession plan highlighting the appropriate linkages within and between generations. Personalize it and make people accountable for working together.
5. Adopt the current infrastructure, as well as new tools, like blogs, and innovative approaches to support this plan. Nurture communities as a key tool for knowledge retention.
6. Establish, maintain and reward connections across the generations and promote access to key knowledge experts even after they leave.
7. Gauge results against business goals in a knowledge retention strategy.

- Like CoPs, blogs and networking tools must grow organically. How and when do you intervene in a way that encourages – rather than shuts down – participation? How can you encourage meaningful interactions that have broad applicability? Interventions work best when they set up the right technical structure to support tool use but do not prescribe how they’re used. With blogs, it’s crucial to provide guidelines to avoid harm to the organization, but let individual creativity operate within these guidelines. Next, expose these initiatives to all participants to trigger further innovation. Finally, call attention to those efforts that are particularly promising, to both give them more recognition and to concretely model best practices.
- How do you engage and reward this cross-generational collaboration and knowledge transfer? The key to encourage cross-generational collaboration and knowledge transfer is to tie it explicitly to strategy – the bigger picture – and to reward individuals for their contributions toward that strategy. Individuals must have common goals if they are to traverse the natural challenges of working together. They must know why they’re working together, what’s in it for them, and how it serves the greater good. And they must be rewarded for their efforts. They won’t collaborate and share knowledge for the sheer sake of it. 

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