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## Becoming a True Knowledge Organization: Best Practices for SMBs

By Robert Rose & Tom Fuhriman, Altiris

Altiris, which was acquired in April, 2007 by Symantec, is a rapidly growing, successful software development company. Prior to the acquisition, there were about 1,100 employees in the company throughout the world. In 2005 it was decided that we had to do whatever was required to improve Knowledge Management issues and the decision was made to launch our Knowledge Initiative.

### Snapshot of Q4, 2005

- Rapid product sales growth, 120 global support staff.
- Culture unsupportive of sharing information.
- Customer satisfaction was deteriorating.
- Support headcount was growing at the same rate as the company.
- Training costs and “time to competency” for new employees too high.
- Every company KM metric was unacceptable.
- Minimal customer self-help.
- KB tools inhibiting progress.
- No company focus on KM and no one driving change.

### Knowledge Initiative Objectives

We generally defined our knowledge initiative as creating an environment that encouraged, supported, and rewarded the sharing of knowledge to achieve the following objectives:

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- Capture most useful knowledge into one global Knowledgebase (KB).
- Improve product quality and company's responsiveness to customer needs.
- Increase employees' and customers' technical competency & independence.
- Maintain quality content without creating bottlenecks in knowledge flow.
- Refine processes to effectively use captured knowledge.
- Increase use and success of customer web-based self-help.
- Slow headcount growth rate of support.
- Involve all company departments, customers, and partners in the KI.
- No more than 2 or 3 job roles dedicated to KI.
- Achieve acceptance of KM principles so results are self-sustaining.
- Measure results through user feedback and accurate metrics.
- Provide easy to use, effective queries and reports.
- Achieve all this within first year and within budget.

### **Basics for a Successful Knowledge Initiative**

We believed and still believe that many companies struggle to succeed at knowledge management because of a fundamental "missing link". Although most knowledge management strategies include a change to the organization's culture, rarely is this actually a main focus. Rather than being one of many steps in the transition to successful knowledge management, we firmly believed that the culture (the shared beliefs, attitudes and emotional environment) had to be the primary focus of a successful knowledge management implementation. Below are the basic principles on which we based our Knowledge Initiative.

### **Basic Principles Used as the Foundation of KI**

- Focus on culture - first and always!
- Identify industry best practices and follow those showing real results.
- Identify gaps in best practices and fill them with our own innovations.
- Accept the reality of limited resources and succeed anyway.
- Focus on people first, technology second.
- EVERYONE is responsible for quantity and quality of information.
- Customers need this information and only we can provide it.
- Include management team – culture, philosophy, coaching and metrics.
- Initially focus on quantity over quality – recognizing and rewarding both, but gradually focusing more on quality over time.
- Focus on adequate article quality – not perfection.
- Build usable metrics and make them visible.
- Use reward and recognition program (Up to \$750 for best articles - \$250 for participation) with recognition by executives.
- Ensure that tools development is driven by proper methodologies

and processes.

- KM participation included in employee performance evaluations.
- KI objectives included in managers' objectives.
- Constant, ongoing training for users & managers.
- Eliminate obstacles and bottlenecks to contributing and publishing.
- Make clear assignments of responsibility.
- High level of executive engagement and visibility.

## Examples of Necessary Cultural Changes

Although Knowledge Centered Support (KCS) has many valuable principles and methodologies which were key to our success, we felt it also has some areas of weakness. For example, although KCS mentions that the underlying culture needs to be managed and modified, most companies don't actually have an organized, sustainable approach to doing so. It has been our experience in observing other companies that this can be a fatal flaw if not recognized by the initiative leaders and participants. Through constant, ongoing training, we gradually convinced the users and managers that these old beliefs were based on illogical thinking and blind habits. Below are some of the cultural changes that we focused on.

### The Culture Must Be Fundamentally Based On Trust

- Employees trust each other to do the right thing
- Employees trust management to support changes
- Managers trust employees to use good judgment
- Employees trust customers to use information with good judgment

### Initial Focus Needs to be on Quantity

- Fast start requires a lot of articles into the KB
- Culture requires we trust the users to manage quality
- Overcoming cultural anchor of "perfectionism" requires pushing quantity initially
- After about 3 months we began to focus more on and reward quality more, achieving a balance between the number of articles being submitted and the scrubbing of existing articles to improve quality
- After a year we are focusing more on quality over quantity, while still following "capture in the workflow" KCS methods

### Drop Perfectionism

- Key inhibitor in the past has been the culture of "perfectionism"
- Most wouldn't share valuable information because they believed an article shouldn't be created until
- technical accuracy was 100% verified
- all elements were polished to "white paper" quality
- grammar and style was of literary quality

- the article went through a formal, rigorous review by a team of experts
- Feared that if any inaccurate information was published it would mean large lawsuits

### Promote Belief that Community Visibility Creates Quality

- If an article with mistakes in it is placed in the KB, any incorrect information should be quickly updated and improved by ANY employee that has additional information, expertise, or possesses writing skills that allows them to improve the quality of the article
- When a mistake is discovered and the right answer is published, the entire community now has the correct information. They see this high-speed update process in action
- Far less inaccurate information is communicated in this shared, visible community than in the old closed individual or team silos of the past
- Requires high level of trust of peers, managers, and other teams (we spent a considerable time building this trust and removing old resentments from past failures)

### Balance Completing Transactions with Sharing Information

- Focus on sharing information instead of just completing transactions.
- Reduce use of metrics that assume closing transaction is success.
- We must capture and share information to improve our capacity (as well as the customer's capacity) to resolve many future problems.

### Significant Achievements

We saw many successes as our KI matured:

- Integration of knowledgebase articles & metrics into product development, sustaining engineering & QA processes.
- Dramatic improvement in hotfix delivery, known issue and feature request processes
- Customers and partners contributing articles that Support uses.
- Dramatic improvement of knowledgebase tool.
- Processes to ensure information flow into the KB were developed for informal repositories (forums, wiki, email, SharePoint, etc.)
- Tool built for customers to subscribe to email notifications or RSS feeds generated by KB article creation or updates
- Headcount growth in support was reversed for the first time, and is now considerably slower than company growth.
- Number of incidents logged by customers slowed for the first time in company history, showing a downward trend all year. This was the case even as the number of customers continued to increase.
- Customer satisfaction and loyalty soared.

### Knowledge Initiative Metrics and Statistics

We met every one of our objectives – exceeding most of them by large margins. Below are the metrics we used to measure our progress and success and as indicators of doing things in the right balance.

<b>METRIC</b>	<b>2005</b>	<b>2006</b>	<b>Increase</b>
Number Of Articles Contributed to KB for Year	1,341	11,411	751%
Articles Viewed at Least Once by Customers	551	6,000+	1,058%
Articles Published to Customer Portal for Year	633	6,000+	848%
Total Article Views by Customers During Year	60,701	692,000	1,040%
Total Number Of Views of Top Viewed Article	3,011	14,844	393%
Views of 2nd Most Viewed Article For The Year	2,863	11,761	311%
Views of 3rd Most Viewed Article For The Year	2,450	10,210	317%
Number of Individuals Contributing Articles	75	250	233%

### Summary

We not only met our objectives, but beyond what we had anticipated, we have also seen a significant increase in teamwork, morale, and employee satisfaction. There is a new feeling of sharing, cooperation, and truly contributing to the team and success of the company in a significant way.

In one year's time we have built a very successful, sustainable, growing knowledge organization. Especially in Support, the use of the KB and the knowledge principles we have taught have become ingrained and integrated in daily workflow. Nearly every support "transaction" includes discussion around KB articles and some form of contribution to the content in the KB. We have seen dramatic increases in every metric we use to measure our progress and success. Our primary focus for 2007 is to build growth in integration of these principles in other departments.

### About the Authors.....

#### Robert Rose

Robert Rose is the director of global services operations for Altiris Inc., where he is responsible for the tools, systems, processes and performance metrics used by the Altiris Global Services teams. Over the past 18 years, Robert has led services, support, training, and knowledge management efforts for companies such as WordPerfect, Novell, Iomega, Cisco Systems and Sybase.

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Tom Fuhriman is the knowledge manager at Altiris Inc., where he is currently leading a Knowledge Initiative. Much of Tom's career has involved guiding Knowledge and Change Management initiatives with companies such as Compaq, Ericsson, Hitachi, and Novell. Tom is expert at working with different cultures, having worked in 16 different countries throughout Europe, Asia Pacific, and the Americas.

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