KM EXchange

CONFERENCE 2019

Thursday, 4th April 2019

Securities Commission Malaysia
Conference Hall 2, Ground Floor
3 Persiaran Bukit Kiara
Kuala Lumpur 50490

CONFERENCE GUIDE

Our Keynote Speaker

Paul J. Corney came to knowledge management while working in the City of London in the mid-1990s. He has worked across a variety of sectors in the Americas, Africa, Asia, Europe, and the Middle East, helping clients to identify and make use of the knowledge that resides inside their organizations.

An experienced practitioner, presenter, masterclass leader and lecturer. Paul, is a visiting lecturer on knowledge and innovation management at the University of Brighton and is well published*.

A Knowledge & Information Ambassador for Chartered Institute for Libraries & Information Professionals (CILIP), Paul is a member of the project board for the development of the Chartered Knowledge Manager Practitioner Programme and a member of the British Standards Institute KM Standards committee that worked on the ISO KM Standard. He has written extensively on the potential value of the new standards for Knowledge & Information Management Professionals.

*A selection of Paul's co-authored books

"The KM Cookbook: Stories and strategies for organisations exploring Knowledge Management Standard ISO 30401" published by Facet Publishing

"Navigating The Minefield: A Practical KM Companion" published by The American Society for Quality

"KM Matters: Words of Wisdom from KM Practitioners" published by Sageology

"Making Knowledge Work in Your Organisation" published by Ark Group

Conference Agenda

9:00am	Welcome Note	*By Securities Commission*
9.10am	Opening Keynote Address and Discussion: Paul J. Corney "Stories and strategies for organisations preparing to adopt Knowledge Management Standard ISO 30401"	
10:00am	Tea Break & Networking Session	
10:30am	Case Study introductions – case studies of KM in Malaysian organisations, including:	*Case presenters for our case studies will give a short pitch introducing their case study to the plenary audience.*

1. Implementing Lessons Learnt at JKR
2. Improving Knowledge Sharing Through the Quality of Document Management at MTDC
3. Developing Strategic KM Initiatives Through a Knowledge Auditing Process
4. Addressing Challenges in Intranet Implementation in 4 Malaysian Organisations
5. Rolling Out a Consistent Approach to KM When Different Regional Offices Have Different KM Needs
6. Implementing a Knowledge Sharing Platform and Processes at a Malaysian University
7. Knowledge Mapping to Develop an Enterprise Taxonomy for a European Government Agency
8. The Process for Developing an Islamic Finance Taxonomy

Decide which in-depth discussions you want to explore. You will have the chance to attend 3 discussions within this session.

11:30am	Break out into case study table discussions (a) Each case presenter will host an in-depth table discussion on their case study	
12.00pm	(b) Move to another case study table discussion to explore a second case of interest to you	
12.30pm	Lunch Break	
1:45pm	(c) Move to a third case study table discussion to explore a third case of interest to you	
2:15pm	Case Study Cafe Debrief	*Open floor discussion on key learning points from the case studies.*
2.35pm	Peer Assist: presentation of 2 real life case studies with KM challenges:	

1. Aw Siew Hoong, Royal Dutch Shell - "When sexy social media tools threaten to cannibalise an established community of practice platform"
2. Patrick Lambe, Straits Knowledge - "What do you do in a KM implementation when one key partner (IT) wants to move quickly, but another one (HR) wants to move slowly?"

3:00pm	Tea Break & Networking Session	
3:15pm	Peer Assist: Table discussions with suggestions and ideas for factors to consider in the peer assist case studies.	
3:45pm	Peer Assist: Debrief and floor discussion on ideas shared at tables. Vote on "best ideas".	
4.05pm	Malaysian KM Benchmarking Survey - briefing and preview	*By Patrick Lambe*
4.15pm	Wrap up of the day - themes and ideas shared	*By Paul J. Corney*
4.35pm	Close of Day, upcoming MY KM Roundtable events.	*By Arief Amron Ariffin*

Case Study Outlines

CASE 1: Implementing Lessons Learnt at JKR
DR KHAIRIL NIZAR MD KHUZAIMAH

Background

Jabatan Kerja Raya Malaysia is the nation's largest technical agency responsible for overseeing the development and implementation of public infrastructure projects with 22,000-strong workforce.

About the Challenge

Findings from the annual published Auditor-General's Report often highlight critical and recurring issues associated with projects undertaken by JKR Malaysia which are mostly pertaining to the department's processes, procedures and competencies.

- In addressing this, mitigation actions were taken in the past such as by issuing do's and don'ts guidelines to provide advice to project team member on what they should and should not do
- Nevertheless, there are deeper issues that would entail the department to constructively challenge its own assumptions and beliefs which can't be addressed by single loop learning activities (do's and don'ts guidelines) focused on small scale issues. What is needed is "double loop" learning where the organization itself changes the way it operates to prevent these issues arising again.

Concurrently, in the past, most of knowledge that is being created and generated from projects at various stages of project implementation (before, during and after) are not properly documented.

- This represents a missed opportunity for the department to capture important lessons learned from projects
- By capturing valuable project knowledge, it will help to avoid recurrence of undesirable outcomes and increase the likelihood of obtaining desirable outcomes in future projects.

What We Did

Realising the importance of having a standard and structured approach for capturing and documenting project lessons learned, the department initiated a Project Lessons Learned programme.

- Four projects were chosen during the pilot phase:

    i. Projek Hospital Kuala Lumpur
    ii. Projek Institut Kanser Negara, Putrajaya
    iii. Projek Infrastruktur Kejohanan Sukan Malaysia XVII Perlis 2014
    iv. Projek Universiti Pertahanan Nasional Malaysia (UPNM)

- Later, *Project Lessons Learned: JKR Practical Guide* was published to provide an understanding of Project Lessons Learned (PLL) and introduce an integrated approach of capturing project learnings, hence, establishing a uniform practice among all project teams.
- JKR's Strategic Plan (2016 – 2020) explicitly incorporated the requirement for every Branch and State Director to produce at least two project lessons learned documents every year
- The Project Management Offices (PMO) at the Branches and State Offices have been tasked to coordinate and facilitate workshops for their own project teams, often with the help of Knowledge Management Office (KMO).
- The documented project lessons learned reports are submitted to the KMO for vetting purposes and later to be uploaded into JPEDIA (online repository portal).
- Relevant SMEs are then engaged to review crucial lessons and are given the tasks to update related knowledge assets if improvements to existing processes and practices are necessary.

Challenges and Lessons Learned

- Ensuring all the right parties to attend the project lessons learned workshops.
- The quality of report prepared by the project team members
- Securing the support and commitment from the top management on the criticality of the PLL
- Strong culture of change management in creating the right mindset of open mindedness and desire to learn

Impact and Benefits

- The increased awareness among project team members on the importance of documenting project knowledge/PLL
- Creating a conducive environment for project team members to share and discuss issues pertaining to their projects and the potential solutions
- Improving accessibility to a growing wealth of project knowledge, readily available for consumption on JPedia
- Mitigating/avoiding the risks of repeating mistakes in the future

Next Steps

Based on the analysis of the project lessons learned, a strategic plan which contains short-term and long-term action plans is currently being prepared to address the issues highlighted in the reports and to put forward relevant recommendations as the way forward. A lesson is only considered as learnt if it is accompanied by an action and lead to a positive change in personal or organisational behaviour.

CASE 2: Improving Knowledge Sharing Through the Quality of Document Management at MTDC

MANSOR HARUN

Background

The Malaysian Technology Development Corporation (MTDC) was established in 1992 to accelerate the commercialization of new technology in small and medium enterprises (SMEs) and universities by providing grants, soft loans, equity funding, and incubation centres, together with an array of value-added services, such as mentoring, networking, and technical advice. As MTDC sits on a knowledge-based repository, Knowledge Management (KM) assumes a pivotal role to create value and facilitate organisational growth by leveraging, improving and refining MTDC's competencies and knowledge assets in support of MTDC's mission and vision.

About the Challenge

The objective of KM is to ensure that MTDC's collective experience and knowledge are codified, stored and made accessible and available to all staff as and when required. In exercising this role, KM developed a strategy based on the findings of an MTDC Knowledge Audit. Two key initiatives of MTDC's KM Strategy are to "Protect against Tacit Knowledge Loss", and "Help staff share high demand documents". In supporting these strategic thrusts, KM intends to enhance existing MTDC's EDMS and develop an appropriate taxonomy/ classification scheme. KM aims to address the following issues:

- Not able to find information.
- Retrieval of information in a timely manner when needed.
- Misfiling and information mismanagement.
- Lack of standards for storing information.
- Failure to distinguish how information resources are required to support MTDC's activities.

The downside impact of these issues included:-

- Where the document/ information required for one particular purpose is not easily available, work could not be established smoothly or accurately.
- Non-retrievable and non-timely Information leads to the delay of, and inaccurate decision making.
- Documents and information is scattered and difficult to retrieve when it is needed to complete certain tasks.

These issues have direct impact on all MTDC's enterprise-wide business functions involving all staff.

What We Did

To address these issues, the KM unit has applied/ implemented two KM initiatives as follows:

- Formulated an MTDC taxonomy/ classification scheme following the Malaysian National Archive's guidance.
- Developed MTDC's Electronic Document Management System (EDMS) to preserve critical explicit knowledge assets in MTDC.

In creating/formulating the MTDC's taxonomy/ classification scheme, we conducted a User Requirements Study (URS) which involved brainstorming, interview and taxonomy design. The complete taxonomy scheme was converted into a MySQL database (247 tables) ready for EDMS development.

The MTDC's EDMS comprises 35 modules. The technologies enabling the MTDC's EDMS are Bootstrap open source framework, PHP, AJAX programming and MySQL database (and web hosting services for testing purposes).

The formulated taxonomy included all necessary and critical business functions within MTDC.

The EDMS is easy to use as it is a customized product for MTDC. It is a digital-centralized platform, with ubiquitous access and economically developed.

Through these initiatives, it encourages the staff to use, share and preserve/ store the critical information systematically.

Challenges and Lessons Learned

Since the implementation of taxonomy/ classification and the EDMS is still new, there is a number of key challenges faced by the KM team to ensure both these initiatives are implemented successfully. Initially, some of the internal stakeholders were not fully cooperative. This particular hurdle was addressed using a series of discussions. Besides that, the intent of an appropriate taxonomy/ classification and EDMS was not fully understood by MTDC staff.

However, this issue has been resolved through continuous sharing and awareness sessions conducted frequently by the KM team. Support from MTDC's top management also played a role in addressing this issue.

We learned that nurturing an understanding among staff and stakeholders on the issues being tackled is a critical success factor for MTDC's taxonomy and EDMS development.

Closer teamwork between the KM team and external consultants are critical in ensuring the success of the project.

Advice:
- Have a clear understand of company's needs/ requirements with regard to the information repository/ storage.
- Understand the general and specific requirements of the KM initiative and be prepared to struggle for its establishment.
- Gain support from end-KM-users, and be prepared to be patient with constant engagement.
- Understand and communicate the benefits gained from the implementation of these initiatives.

Impact and Benefits

Our goal is to have a proper/ centralised repository to store all the critical documents and information in MTDC. We targeted to upload at least 10,000 critical documents/ information (e.g. fund agreement, fund database, proposal paper, corporate event etc.) as MTDC assets in the EDMS. To date, we have achieved 43% of the targeted number.

We now have a standard classification scheme (e.g. 100- Administration, 300- Asset and ICT) and this has been used and applied as reference numbers for the information. For example, MTDC/500/001/001/002/015 refers to the staff "Guarantee Letter" and is classified under human capital-guarantee letter.
- Staff can access or retrieve documents/ information that they need from anywhere, at any time, not limited to office area and office hours.
- We have avoided redundant effort and ensured that information is accurate.
- We have avoided delays in the time required to complete urgent tasks due to information access issues.

We have conducted several pre-trials for the new EDMS in order to get feedback from staff. The feedback is as follows:-

The new system is easier to use and has more useful functionality compared to the previous one.

Example 1:
Staff had previously highlighted that it was difficult to find/view the document that had been stored/ uploaded to the previous system. There was no history function. Those functions were added to the new system as per user request and is easy to use.

Example 2:
The new system allows staff to store/uploaded information in a variety of formats (e.g. video, JPEG, audio, Word, pdf, and etc.) compared to previous system that is only limited to pdf and Word.

Example 3:
The new system allows the user to search for documents that they have uploaded using a variety of searching methods such as "basic search, advanced search, date search and saved search" compared to the previous system which was only limited to two types of methods, "basic search" and "advanced search".

When all the critical information/ documents have been well preserved, MTDC can provide accurate information and data to the public/ counterparts/ government and related parties when needed.

Information access will help to improve MTDC's strategy to promote company and business activities.

If we don't have KM, MTDC would not have recognised the need to manage or preserve its collective competencies and knowledge assets. It would also mean there is no continuity of organizational learning.

Next Steps

For the next steps, we will enhance our records management system in both electronic and physical forms. We also plan to adopt ISO 15489-1-2016 (Information and documentation- Record Management) as an internal guideline/ policy for the management of records.

Besides that we also plan to develop MTDC's KM portal that would serve as a knowledge repository, collaboration platform and a sharing platform for important information/ knowledge assets. This portal directly supports at least three key initiatives within MTDC's KM Strategy, namely "Protect against Tacit Knowledge Loss", "Help staff share high demand documents" and "Lead KM for the MTDC ecosystem".

CASE 3: Developing Strategic KM Initiatives Through a Knowledge Auditing Process

ARIEF AMRON ARIFFIN

Background

The organisation is a capital market regulator whose role includes regulating the Malaysian capital market, protecting the investors and developing the Malaysian capital market. It has a strength of 700 employees.

About the Challenge

Managing the institutional knowledge in the organisation has been elusive. Despite many anecdotal symptoms about coordination challenges, and challenges to recall what the organisation had achieved in the past, concrete evidence of those challenges was not apparent. As a result, the KM team was firefighting and implemented KM programmes based on the flavour of the month.

Our initiatives were planned and executed either based on direction from the top, or based on the issues that were highlighted to the department by our stakeholders/users. Therefore, we were firefighting and not coordinated. We managed to address different symptoms but it was difficult to get to root causes. Thus, the issues kept re-emerging over time.

This issue impacted the KM department's annual business planning.

What We Did

We needed to have more evidence before we embarked on a KM initiative. Therefore, we initiated a systematic knowledge mapping and KM diagnostics initiative to map out the knowledge assets of the organisation and the most important KM opportunities.

The knowledge mapping initiative comprises of 4 segments – knowledge audit, business pain point analysis, cultural analysis and knowledge flow analysis. A tool called Aithin was used for the knowledge mapping.

We were able to gather proper evidence of KM related issues from the initiative. We were also able to establish an inventory of the knowledge assets of the organisation. More importantly, the data gathering effort through the use of the tool was faster than the manual way. This helped us to focus more on analysing the data. Since we had the data, over time we were able to observe organic improvements made by some departments who took part in the initiative.

Challenges and Lessons Learned

Scepticism about the overall knowledge mapping initiative:
KM started as an information sharing initiative in the SC in 2000. Then came a few technology implementations and also efforts to retain tacit knowledge via case studies and codification of expertise. Despite successful conclusion to some of the initiatives, the overall challenges in sharing information and knowledge in the SC did not improve. Impact was not felt from the top and we had to gain the support from the line departments. So 2 workshops on the knowledge mapping process was done in 2015 to promote awareness and understanding to line departments and also to gain their support to be part of the initial knowledge mapping group.

Presenting the findings:
Presenting the findings is a challenge because different level of stakeholders see, read and make sense of the findings differently. For example, with the reps who participated in the knowledge mapping workshops, they were able to relate to the findings better than those who did not participate in the

workshops. Some of the standard terminology in KM which we thought were common to us, can be a challenge with some key stakeholders. As a result, several rounds of engagement with key stakeholders were held to provide clarity, understanding and also to address their concerns.

Key lessons:

1. Continuous awareness
Awareness is critical. It has to be continuous because to manage knowledge well in the organisation, we have to work with the people in the organisation. These people are focused in their core business area and sometimes KM matters gets either diluted or not prioritised properly.

2. Frequent engagement with stakeholders in the organisation
More engagement at the senior level is as important as engaging with the people on the ground. At the senior level, KM teams need to show business impact and how KM initiatives help to address business issues. It is important to show evidence related to their core work and the engagement will help to improve the understanding gaps.

3. KM work can be technical too
There is a need for the team to gain the right business knowledge when working in KM. There are core fundamentals that KM teams must understand and know. Hence, learning from the right sources is important.

Advice:

1. Learn about KM and knowledge mapping
2. Get a strong sponsor
3. Gain buy in from senior management
4. Communicate and create continuous awareness

Impact and benefits

1. We improved the clarity of KMD's business planning process - we managed to link the outcome of the knowledge mapping initiative with the future initiatives in our 2019 business plan.
2. We improved buy in from senior management - the data from the knowledge mapping helped us to provide evidence to senior management.

The main reasons for our success were a supportive leader, a competent and dedicated working team, and being able to build good working relationships with the participating departments.

In future we expect an improved stakeholder experience in KM rollout, and to be able to ensure business continuity and improve time to knowledge for new staff.

If we did not have KM, the issues on knowledge loss would not be addressed properly resulting in significant impact on business continuity, and SC may find itself reinventing the wheel thus making it less efficient and effective in fulfilling its roles and responsibilities.

Next Steps

We will continue to pursue this initiative and map as many departments as possible in 2019 with the aim to establish a comprehensive enterprise knowledge map for the organisation.

CASE 4: Addressing Challenges in Intranet Implementation in 4 Malaysian Organisations

CHERYL TEH

Background

This case is about the challenges of implementing intranets in diverse organisations:

- local office of a global organization
- statutory body
- PLC with 14,000 staff
- sovereign wealth fund (SWF).

About the Challenge

a) **Local offices of a Global organisation (2000-2003)**
KM strategy and processes were envisioned at HQ level, not taking into account local constraints, legal requirements and cultures of the offices in the Asia Pacific region.

b) **Statutory Body (2004-2006)**
Many systems with overlapping information fields, old ways of doing things.

c) **PLC with 14,000 staff (2007-2008)**
Need to get information to staff quickly but only 1000+ staff had access to intranet. Staff also came from various diverse backgrounds (different countries). As an old organisation with high turnover, there was an issue with lost knowledge.

d) **SWF (2011-2017)**
Existing "unfriendly" intranet in place already. K-sharing was not part of the culture.

What We Did

a) **Local offices of a Global organisation**
Every country presented a different challenge as each country was a different stage in their KM journey. Some already had intranets in place so didn't want to use the global one, whilst other countries had nothing in place so were very happy to have access to global information. However, at that time, internet access was very slow as servers were in the Netherlands. I had to be very flexible and adaptable; attune to each country's situation and deliver customised training based on not just their country, but also internal office cultures but yet delivering consistent key messages from HQ.

b) **Statutory Body**
Implemented intranet (using SharePoint) to host the organisation's information in one place for starters. Realised that most work required staff to work together but many people didn't know each other so, organised speed networking sessions to get colleagues from various divisions to meet face-to-face to put names to faces, so that they would be able to leverage collaboration on the intranet more effectively.

c) **PLC with 14,000 staff**
The lack of technology infrastructure was the biggest challenge as there was no cheap and easy way to communicate with staff. Today, with mobile and cloud technology and infrastructure and through use of Apps, many of the challenges could be overcome quite easily.

d) **SWF**

With bad experiences with the current intranet (slow and unfriendly UX/UI), the main challenge was to demonstrate the value of the intranet. We migrated to SharePoint for better integration with work processes (single sign-on), and culled the taxonomy to fewer, but broader terms for easier understanding. We organised knowledge sharing sessions and ensured they were recorded, uploaded and accessible from the intranet. We tried to learn what the business wanted, but the main users had many other better sources of knowledge and information available to them through specialised services. Later we realised that all the media assets were still stored on DVD and CDs and people were wasting a lot of time searching for them. The MediaBank was an initiative which helped save time and effort in searching for media assets when required.

Challenges and Lessons Learned

a) There is no ONE solution that can be applied to different organisations for reasons including, different industry, culture and where the organisation is on the KM cycle.

b) Having top management buy-in helps a lot to push KM initiatives

c) Organisations normally have some form of "KM" processes already in place but it may be 'labeled' as something else. Don't try to claim it to be a KM process. Instead, build on what foundation they may already have.

d) Identification and appointment of KM Champions in individual departments is important. KM Champions need to have the right personality and attitude as well.

Impact and benefits

a) **Local offices of a Global organisation**
Having access to a global database and staff directory helped the local offices respond faster and better to their clients in terms proposals and reports.

b) **Statutory Body**
Having general content available in one place i.e. on an intranet vs contacting various divisions e.g. HR, was beneficial to the individual staff.
Uploading of news articles (vs cutting and circulating) resulted in more efficient access, saved time and trees (paper)!

c) **PLC with 14,000 staff**
Even with very manual means of communications and delivery, information was shared widely and we think it contributed to better service delivery to end customers.

d) **SWF**
For a small population, they found the new intranet more efficient to do desktop research, finding admin related resources (policies, forms, templates). There was learning and better understanding of other business areas through the uploaded videos of k-sharing sessions.

CASE 5: Rolling Out a Consistent Approach to KM When Different Regional Offices Have Different KM Needs

SHARON WONG

Background

The ZICO Holdings Group comprises SGX-listed ZICO Holdings Inc. and its multi-disciplinary (MDP) subsidiaries delivering a range of professional services in the ASEAN region. The ZICO Group comprises the ZICO Holdings Group of companies and law firms in the ZICO Law Network. Where the regulatory framework allows, the ZICO Law Network law firms are subsidiaries of ZICO Holdings Inc. Even so, all law firms in the ZICO Law Network practise independently, as brand affiliates of the ZICO Holdings Group. The ZICO Group has a presence in all 10 ASEAN countries. The ZICO Group is linked by a common centralised shared services platform provided by ZICO Knowledge Services Sdn Bhd, a subsidiary of ZICO Holdings Inc. This integrated regional business services (iRBS) platform provides services such as KM, training, human resources, IT and finance.

About the Challenge

The ZICO Group expanded aggressively, and it was critical to harness the accumulated knowledge within the organisation as well as to rapidly build capacity, expedite the decision-making process, leverage on innovation and technology so as to increase productivity while staying competitive. It was important for there to be quick and seamless knowledge transfer from the more established entities to their newer and smaller offices or practice groups to build skill sets, generally through knowledge sharing and training. To establish brand quality assurance, precedents, documents, communications, as well as processes, needed to be streamlined.

We have offices in 10 different jurisdictions with different legal systems – some are under the common law system, and some under the civil law system. Different offices had very different needs and the challenge that KM faced was first identifying those needs and putting in place services that would suit a diversity of needs.

The offices in the ZICO Group were a diverse lot. There were well established offices familiar with international work, there were smaller offices focused essentially on domestic work and then there were the new offices starting from scratch. Each had different expectations of the iRBS services available and, except for the larger well-established offices, there was a lack of awareness of the role knowledge management played. As a result, KM initiatives were implemented unevenly in the organisation. There were knowledge silos between practice groups, as well as between regional offices geographically. Opportunities to collaborate, share knowledge, increase productivity and efficiency were not fully leveraged on, especially as the telecommunications and internet infrastructure in the region was extremely variable.

Changes were made incrementally. The first KM efforts began with Zaid Ibrahim & Co in Malaysia, the largest office in the ZICO Law network, and then later expanded to the other offices in the ZICO Law network. The ZICO Law network now has 18 offices in 10 ASEAN countries, 90 partners, and over 300 fee earners, all serviced by a central KM unit.

What We Did

Taking feedback from key stakeholders, we streamlined our KM services into 4 core areas that were relevant to the organisation's overall objectives and met the most common needs that we could see. The core areas included the management of knowledge resources, precedents and library; legal and business updates and publications; consultation; and training. We communicated our vision and obtained buy-in from the leadership of the various firms in the ZICO Law network.

A network of knowledge liaisons and champions within each regional office was set up to provide "on the ground" feedback of the local needs and facilitate the deployment of KM and training initiatives in their respective offices. This was instrumental in increasing KM's visibility and reach in the region.

The services on the iRBS platform generally complement and work synergistically. Much of KM's functions overlapped or was synergistic with services provided by the regional training team, leading to the 2 teams working closely together. To ensure that all iRBS services were delivered in a cohesive manner, it was important for the KM and training team to collaborate with colleagues in IT, business development, and HR to craft a common vision, and where possible, minimise overlaps and duplication of efforts. This was done through constant communication and regular meetings between the service heads, and the development of standard operating procedures, policies and guides.

As delivery of services relies heavily on technology, an IT transformation exercise was implemented to streamline learning, knowledge sharing, document management, and communication tools between the various offices. Together with the training team, we leverage on technology to provide a knowledge sharing platform and a virtual academy that facilitates self-learning and online classrooms. Participation in training is tracked and is recognised during performance appraisal, and forms an integral part of the career development of people within the organisation. To raise the profile and showcase thought leadership within the organisation, the KM team helps develop and edit content on the latest laws and business updates, which the business development team then publishes and disseminates to external clients.

The impact of KM's initiatives is enhanced due to strategic collaboration with other services on the ZICO iRBS platform, such as training, business development, IT and HR. The ZICO Group benefits from operational and cost efficiencies generated from economies of scale, thereby allowing them to focus on revenue generating activities. More importantly, with the diverse professional services available within the ZICO Group, KM could help bridge the gap between legal practice and corporate realities, through common initiatives.

Challenges and Lessons Learned

There is no one-size fits all. The balancing between scaling for cost efficiencies while retaining relevance in a multi-disciplinary practice is still, and, will likely remain, a major challenge. Prioritising areas for attention due to resources being finite ultimately means not addressing the more bespoke issues that may be important to some offices. The importance of undertaking a transparent and accurate needs analysis with the leadership and key stakeholders, and an understanding of the organisation's culture is essential for KM to effectively address the needs and the gaps in as comprehensive a manner as possible.

KM has more impact when working closely with other services. When KM functions work extremely closely with functions in training, business development, IT, HR, and other support services, the outcome is that all the services benefit. The marginal gains across the services platform will exceed the sum of its parts.

Have a sustainable roll-out plan; engage with stakeholders throughout. Balance long-term projects with small "quick wins". The benefit of "quick wins" is that people can see the results, which is a good way for the KM team to build trust and further buy-in, while keeping their sights on larger projects that may require more time and more costs. It also helps when engaging with management for greater resource allocation and expansion of services.

You need knowledge champions. These are individuals that believe and enthusiastically support KM, at both the leadership and operational levels. They provide the critical feedback that helps you fine tune your KM efforts, and they influence their peers to get involved. People are at the heart of a good knowledge strategy.

Impact and Benefits

Stronger collaboration between the ASEAN regional offices, as well as the non-legal services, as they see the positive impact that knowledge, and learning initiatives has on retaining and developing talent, as well as client and business development. This is further reinforced by the use of technology and collaboration tools that have improved communication and bridged the geographical distance between the various offices, and communities of practice. With these in place, the organisation is more agile and responsive to disruptions, and able to increase efficiency and productivity.

Next Steps

An organisation that treats knowledge as an asset and promotes a strong learning culture is critical to the success and sustainability of KM. This culture needs constant reinforcement through clear communication and dialogue. KM plans to extend and scale its services further to other business units and clients, and make incremental improvements to its services to address gaps identified from needs analysis and client feedback. We will also continue to explore ways to leverage on technology to expedite delivery of knowledge sharing and learning initiatives throughout the region.

CASE 6: Implementing a Knowledge Sharing Platform and Processes at a Malaysian University

GEETA ALBERT

Background

This case is about a Malaysian University which is in the business of teaching, learning and research. This organization has around 26,000 students, academic and non-academic staff.

About the Challenge

The University has implemented several digital repositories to capture and document their explicit knowledge assets.

Their challenge was to identify, capture and codify tacit knowledge to prevent knowledge loss among the academic staff.

In 2014: The Library was given the task of implementing KM for the University.

The As-Is scenario:

- An institutional repository (of theses and documented research) is accessible 24x7.
- Academic course work and tutorials are managed by the Learning Management System and documented best practices are accessible via their ISO documents, existing policies and procedures.
- The next challenge related to the know-how in the minds of experts. Access is only by communicating with experienced knowledge workers for problem solving. But this depends on knowing who they are.
- The KM project was initially implemented for academic and non-academic staff (around 3,000 members)

What We Did

In 2014 we commenced with a knowledge audit to identify explicit and tacit knowledge assets. A KM framework was built to determine KM strategies and action plans.

In 2016, we adopted the Communities of Practice KM tool to 'capture' and codify experience-based knowledge. A KM team was built to drive this project. The Project Director was the University CIO and the Project Manager was the Chief Librarian.

The KM strategy was developed using Stankosky's 4 pillars focussing on Leadership, Organisation, Technology and Learning Dimensions. Due to budget constraints, Drupal (an existing open source collaborative software) was adopted as the platform to support knowledge sharing.

Two key features of the project were:

- developing the competencies of library liaison officers to implement regular KM awareness programmes and market the need for KM; and
- capturing and codifying over 2,000 conversations from multiple domains of knowledge.

Challenges and Lessons Learned

The change of leadership (the CIO and KM Project Director) impacted the continuity of the KM programme. In the university, the CIO has a two-year term. Steps taken:

- We involved top management in our KCONNECT conferences. This year the Vice Chancellor will be providing the keynote address – this keeps KM at the forefront of senior leadership's considerations.
- The library's regular promotion programmes across the University seem to be creating waves.
- Promotional collateral regularly has an impact.
- If quality content is built (like what was achieved in JKR), then top management is only required in a supportive role

The lack of commercial collaborative software with latest features (mobile ready) and technical support were the main barriers. This impacted adoption and usefulness of the platform.

We are seeking a technological upgrade in 2020 and with consistent promotion, the University has decided to adopt the Virtual CoP Portal as the main source of the University's tacit knowledge capturing tool. Drupal will be maintained until resources are approved. The introduction of commercial social collaboration tools like IBM Connections with mobile responsive and integration features packaged with technical support will be an improvement that should drive greater adoption.

Lessons:

- Probably we should have insisted on a good commercial collaborative software with effective technical support at the outset. Users are discerning and require the best before they embark on using KM tools;
- We can address the Organisational and Learning Dimensions relatively easily. However Leadership and Technology are uncontrolled variables that require strategic planning and resources.
- Commence promotion programmes prior to implementing KM to manage expectations.
- Create a Pilot and share its outcomes with users.
- Secure the right technology – get it right the 1st time!
- And finally be consistent in your marketing and content creation programmes. Users must know you are passionate and believe in KM before they themselves will get serious.

Impact and Benefits

Informally we have seen benefits in the form of sharing of experience, acquiring new knowledge and an enhanced ability to contact knowledge donors – leading to quality and service improvement.

We will be implementing a survey to measure the effectiveness of our efforts more systematically. This will be available by end 2019. The tangible benefits cannot be ascertained yet, and our survey will show the extent to which our efforts have paid off.

The main reasons for progress:

- The Transfer of Skills programmes over the years to build the organization's competencies in promoting KM to ensure the usage of the technology; and the content creation workshops that were provided.
- KM is a must. So every agency has its own formula to getting it right. We have to be there to know what needs to be done, and get it done. At times with our own resources first!
- If you don't have KM, what could happen? People will perform tasks as they see fit. Best practices get re-created and if it is a problem solving issue, knowing who to call and how to access them will be crucial.

Next Steps

The Vice Chancellor has now taken an interest, and there is good indication resources may be available for an upgrade of the platform.

There is a request to upgrade the technology to a commercial product to ensure better usability and adoption, and regular support and upgrades.

Opening the collaboration software to the student population will increase the activity levels and ensure that the relevancy of KM can be measured.

CASE 7: Knowledge Mapping to Develop an Enterprise Taxonomy for a European Government Agency

EDGAR TAN

Background

A European taxation and customs agency with about 6,000 staff spread over the headquarters and about 20 districts.

About the Challenge

The Client wanted to centralise information on a common platform to enable better knowledge sharing across the organisation, and they recognised they had to develop a taxonomy before buying an information management system. After a public tender process, we were selected to be their consulting partner.

The size of the organisation and the diversity of business activities were a major challenge, as the client wanted to seek inputs from all relevant departments for the taxonomy. That meant having to conduct more than 20 knowledge-mapping workshops for about 200 distinct business functions.

What We Did

We developed a standardised process for knowledge mapping that was applied across the 20+ knowledge mapping workshops. The standardisation was important because, due to budgetary constraint, a portion of the knowledge mapping had to be done by the client themselves. They had to be able to replicate the process while we were not there.

The knowledge mapping process asked of the department representatives the following:

- List their most important business activities
- Map the knowledge needed to conduct those activities, and the knowledge produced
- Identify associated knowledge risks, gaps and accessibility issues
- Identify knowledge belonging to other departments that are useful for one's own
- Send screenshots of their network drives' folder structures to the KM team

What helped with the scalability of the knowledge mapping activity was not just the capability transfer of knowledge mapping to their internal KM team but also that a large portion of our methodology was already embedded in the software that we used during the workshops. As the software is cloud-hosted, it allowed us to monitor progress of the knowledge mapping workshops remotely (we were back in Singapore). We contacted the KM team via WhatsApp when we noticed issues with the knowledge maps.

The vocabulary they used to describe their activities and the information and knowledge they use to perform the activities, formed the basis of the taxonomy design. We supplemented this with what we call "user warrant" – where we collected evidence of how they currently organize their information resources (e.g. folder structures, team-site structures, website, training materials, etc). We analysed the maps to identify the key facets, extracted the vocabularies related to each facet from the knowledge maps, and structured the taxonomy facets into a taxonomy management system. We then ran a series of taxonomy tests using typical task scenarios which we also extracted from the knowledge maps. The taxonomy tests with users helped us to identify issues of ambiguity, predictability and consistency of interpretation with the taxonomy, as well as gaps in vocabulary.

Challenges and Lessons Learned

This was a very large and complex organization. To have us conduct all the workshops would have exceeded their budget, so the approach adopted was for us to transfer knowledge mapping capability to their KM Team. We trained them in how to collect inputs for the taxonomy, show them how to do it, and then have them do it autonomously. We doubt that this approach would have worked if the KM team had been less willing to learn. Furthermore, they had co-opted their internal communications colleagues to help who, as it turned out, were equally willing to learn and engage with the process.

For a taxonomy project of this scale, using a paper-based approach for knowledge mapping would have been unthinkable. Yet, software technology does come with its own set of challenges. As the client did not have a suitable workshop venue available during that period of time, we ended up conducting the workshops in a multi-purpose room that wasn't built for purpose. For example, it was located underground and it had no wifi connection. We had to bring our own mobile data routers, which had unstable internet connections.

The organization had used a federalized way of managing its activities for about ten years. Each region had its own way of working. This meant that there was a lot of inconsistency in how they mapped their work, and how they interpreted the taxonomy. As a result, we underestimated the amount of effort required both for the mapping process and for the taxonomy revisions after the test. As the timeline was the most important factor in the project for them, this meant the workload became very heavy towards the end of the project.

Impact and Benefits

The knowledge mapping process was the first time that many colleagues from different offices had had an opportunity to model their work, and understand the knowledge and information interdependencies between what they did. The exercise received very positive feedback, and created a lot of on the ground change management support for the change management initiative.

The complexity of the organization meant that the taxonomy itself was fairly complex and needed careful ongoing management. The senior management team therefore approved the purchase of their own taxonomy management system, and the full time appointment of a taxonomy manager.

Having a common taxonomy and thesaurus means that colleagues from different departments in different locations throughout the country will be able to navigate and find relevant information resources in their information management system more easily and quickly.

Next Steps

The taxonomy is currently being integrated with the search functionality in a SharePoint platform now. The platform has a customized and intuitive tagging module, and the taxonomy is being used to suggest related resources to staff when they conduct searches, as well as to refine search results.

CASE 8: The process for developing an Islamic Finance Taxonomy

NOREEN NATASHA AZMEE

Background

The International Centre for Education in Islamic Finance (INCEIF) is a private university set up by the Central Bank of Malaysia in 2005 and it offers postgraduate level courses in Islamic finance. It is established to serve the need to develop and nurture talents and experts in the Islamic finance industry.

INCEIF Knowledge Management Centre (KMC) envisions to be the reference point for Islamic finance knowledge. It is a powerhouse in supporting INCEIF's vision to be the knowledge leader in Islamic finance. The KMC has over 16,000 items in its collection of printed and digital format knowledge resources in Islamic and conventional finance.

About the Challenge

Since its establishment in 2005, the KMC has been using a library classification scheme – the Library of Congress Classification (LCC) to classify and categorize its printed collection. A huge number of research works produced in the field of Islamic finance cannot be classified using LCC because LCC provides a very general and limited classification when describing Islamic finance topics. For example, two topics such as Islamic capital market and capital markets are sharing the same call number, but actually these topics are different in their scope. In 2011, the KMC developed INCEIF Digital Library Taxonomy to classify and categorize Islamic finance topics specifically for its digital collection. However, the coverage of the topics for Islamic finance was not comprehensive, making the task harder than it should be.

What We Did

To address the issue, the KMC team developed the INCEIF Islamic Finance Taxonomy. The development of the taxonomy adopted a content modelling approach. Content modelling approach is a representation of the topics, document types, and content models and their inter-relationships.

The journey of development INCEIF Islamic Finance Taxonomy was as follows:
1) Determine taxonomy purpose, focus, and scope
    - Two purposes are: (i) To showcase INCEIF thought leadership; (ii) To improve the previously developed INCEIF Digital Library Taxonomy
    - The focus is the knowledge residing at INCEIF and the scope is content management.
2) Identify key users
    - The stakeholders of INCEIF KMC are the key users: (i) faculty members; (ii) students; and (iii) researchers.
3) Develop use case scenarios for key users (through interviews)
    - Use case scenarios for each group are developed to investigate the main activities performed by each user group, where Islamic Finance taxonomy would provide support.
    - The main activities for faculty members are: (i) teaching and learning; (ii) research development; (iii) writing publications; and (iv) provide training
    - The main activities for students are: (i) writing publications and research proposals; (ii) produce project papers; and (iii) organizing industry talks
    - The main activity for researchers is: (i) research development
4) Extract user, content, and standard warrant
    - The development of taxonomy involves three main types of warrant – user, content, and standards warrant. The main goal of this stage is to collect abundance of Islamic finance vocabularies and organise the vocabularies into the facets and topics.

5) Model ecosystem and content types
- The team modelled the facets (structure) of the taxonomy consisting of Islamic Finance Topics, Document Types, and Content Models showing interrelationships between Persons, Organisations, and Events.

6) Design and test
- The team engaged with 11 Subject Matter Experts (SMEs) to achieve the consensus from the SMEs on facets and topics which were designed and developed by the team. Focus group syndication sessions were conducted involving all the faculty members and the team modified the taxonomy based on the feedback received (wherever applicable) from the sessions.

The INCEIF Islamic Finance Taxonomy was applied within the INCEIF Knowledge Repository (IKR) to organize and categorize Islamic finance collection according to Topics, Document Types, and Content Model – Person.

Challenges and Lessons Learned

There are several challenges and lessons learned throughout the process of coming up with INCEIF Islamic Finance Taxonomy:

1) *Lack of capacity (skill, knowledge and experience) in developing taxonomy.* The KMC team conducted internal taxonomy development training prior to developing and implementing the taxonomy to understand the development methodology and value of taxonomy to INCEIF.

2) *Too much variation in vocabulary (English and Arabic) identified during the content warrant stage.* An example for this is the terms 'Islamic bonds' and 'sukuk' that share the same meaning. Another challenging example was that there are four different spellings for the Arabic term 'Bai ad dayn'. The team distinguished the terms using Preferred Term (USE) and Alternate Term (USE FOR) for the above examples.

3) *Different schools of thought between the Subject Matter Experts (SMEs) for the same terms.* The team facilitated a consensus building process among the eleven SMEs that were engaged for the facets and preferred terms.

Impact and Benefits

The INCEIF Islamic Taxonomy that has been used since 2016 gives benefits such as:

1) Effective management and preservation of the Intellectual Contributions (ICs) of the Subject Matter Experts (SMEs)
- Overcomes the limitation of limited topics for classifying Islamic finance materials from the existing classification scheme.

2) Acts as a focal point that direct readers to the topics of Islamic and conventional finance in INCEIF Knowledge Repository (IKR)
- Knowledge by the Subject Matter Experts (SMEs) is correctly categorized and easily retrieved by the readers.

3) Reduces the amount of time spent on duplication and reinvention for the staff
- Avoids duplication of terms with variant spellings.

4) Guiding the organisation to speak the same language when describing topics and document types
- The structure to categorize terms/vocabularies comes from the Subject Matter Experts (SMEs) – guides the entire organization towards describing topics in a standard manner.

5) Build internal capability (capacity building) of the information professionals.
- Taking advantage of the knowledge from the Subject Matter Experts (SMEs).
- Improve individual skillsets to classify, index and manage contents through the standardized taxonomy.

Next Steps

- Review and revise INCEIF Islamic Finance Taxonomy on yearly basis.

- Promote the use of the INCEIF Islamic Finance Taxonomy to other departments at INCEIF.

- Plan to conduct educational outreach activity outside INCEIF – to share the team's experience on the development of taxonomy.

Visit us at mykmroundtable.org

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