Personal Knowledge Management

Doug Cornelius
Chief Compliance Officer
ComplianceBuilding.com

Personal KM

- Dealing with the Firehose
- What's In It For Me
- Lessons from Web 2.0
- Self-Interest v. Altruism

These are the four themes of my presentation.

Hopefully I can shed some light on them.

I'm going to start out with talking about my journey through knowledge management.

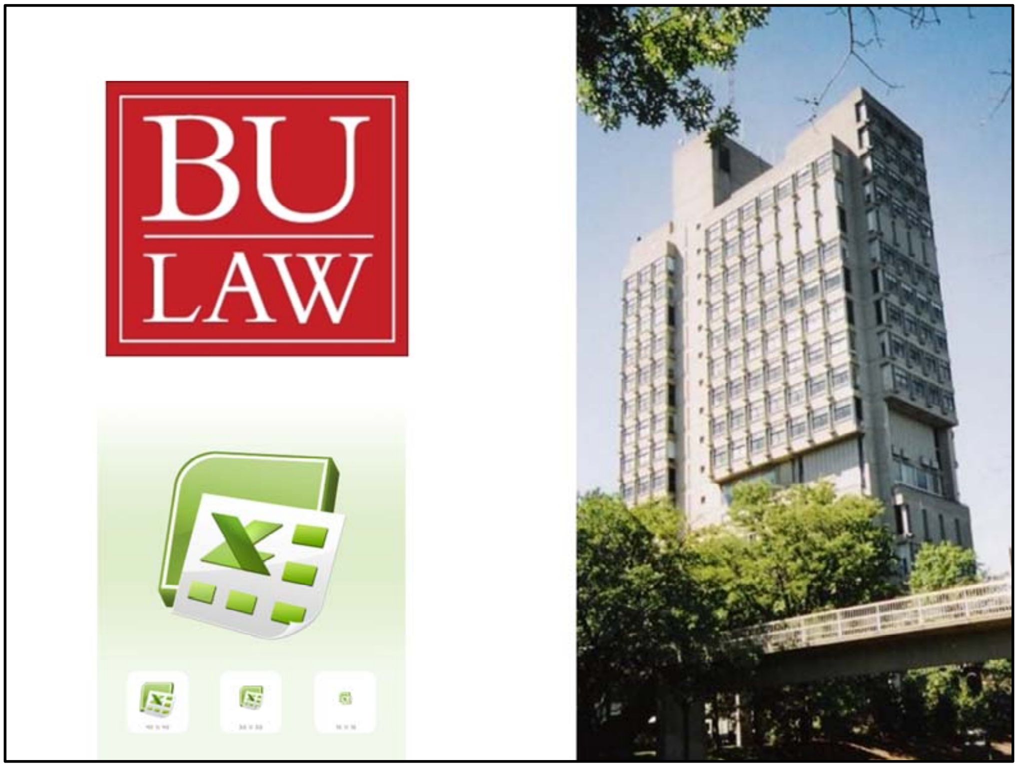
[If no Audience introductions yet.
We are hearing different approaches and focuses on KM, I would like to hear you thoughts.

Name. What you do. How you define knowledge management]

BU LAW

I thought I would take you through my story to see how I came into knowledge management. And I came to have these thoughts on knowledge management.

Lets start my story way back in time. Back to when I was in law school.



One of my classes in law school was Real Estate Development Law.

It turns out the class had little to do with the law.

It was all about modeling the economic performance of real estate investments. The class involved lots of number crunching, so I ended up learning how to use Excel as part of the class.

After law school, I was hired by Goodwin Procter. One of the big law firms in Boston.

I ended up working on a fair number of transactions that involved multiple properties. I had some information management issues that just were just poorly suited to handling in a word processing document.

I was on the business end of a firehose.

So I started using Excel as part of my legal practice.

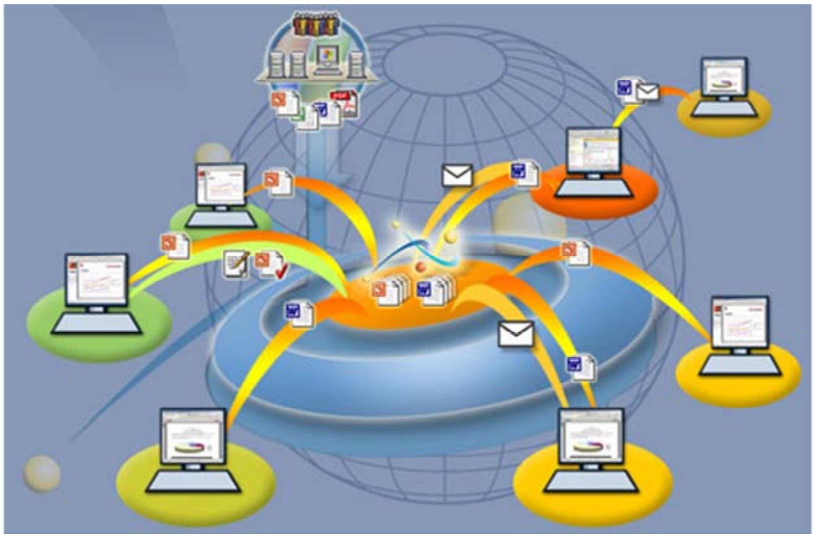
This was the mid 90's.

Many lawyers back then practically prided themselves on still using a quill and inkwell. There were many lawyers who barely used their computers. This predated the ability to use email for client communication. It was not until 1999 that the American Bar Association issued a ruling that the attorney/client privilege was not violated by using email.

So a lawyer using excel at that time was unusual.

It also made me one of tech lawyers at the firm and led to me being involved in some of the technology decisions for the firm.

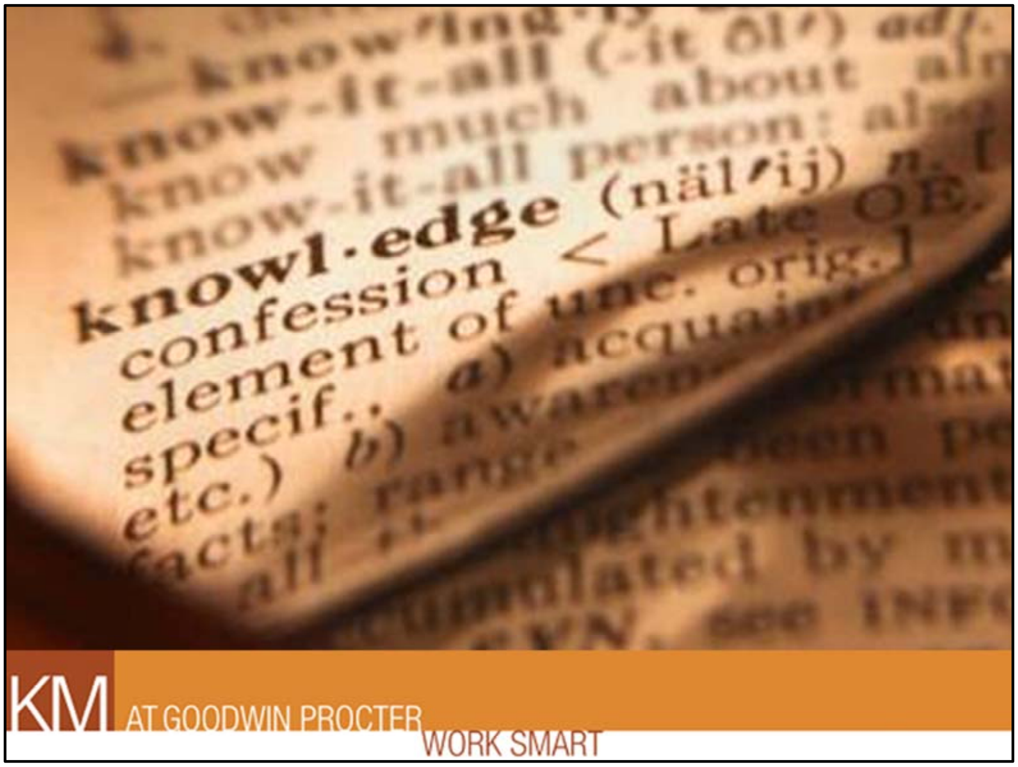
Document Management System



First up on this tech task list was picking a new document management system for the firm.

One advantage that a professional services organization, like a law firm, has over lots of other industries is that we write lots of stuff down. We have lots of documents. So we have lots of written content, getting past the tacit-explicit issue.

Since lawyers share documents with each other and have our assistants help with editing the documents, it makes sense to keep documents stored in a central system, rather than as files on individual computers.



The project evolved into a larger knowledge management initiative at the firm. The idea that we should be making better use of the collective knowledge of the individuals in the firm.

What we know
Who know
What we know how to do

In the end that is what a law firm sells. Its knowledge. Lawyers got the concept, but, like most companies, the challenge was in the execution.

I really ended up in the knowledge management field by accident. Probably like many of you here in the audience.

Intranet

inet
The Goodwin Procter Information Network

One of the big knowledge management initiatives was to set up an intranet where we could share information and pull information from underlying systems and put it into better context.

At least that was the theory.

Everyone thought intranets would be wonderful tools for knowledge management.

Like most intranets from a few years ago, they looked good in theory, but worked poorly in execution.

You needed to know html.

You really had to go through the IT folks to get anything done.

It was hard to contribute information.

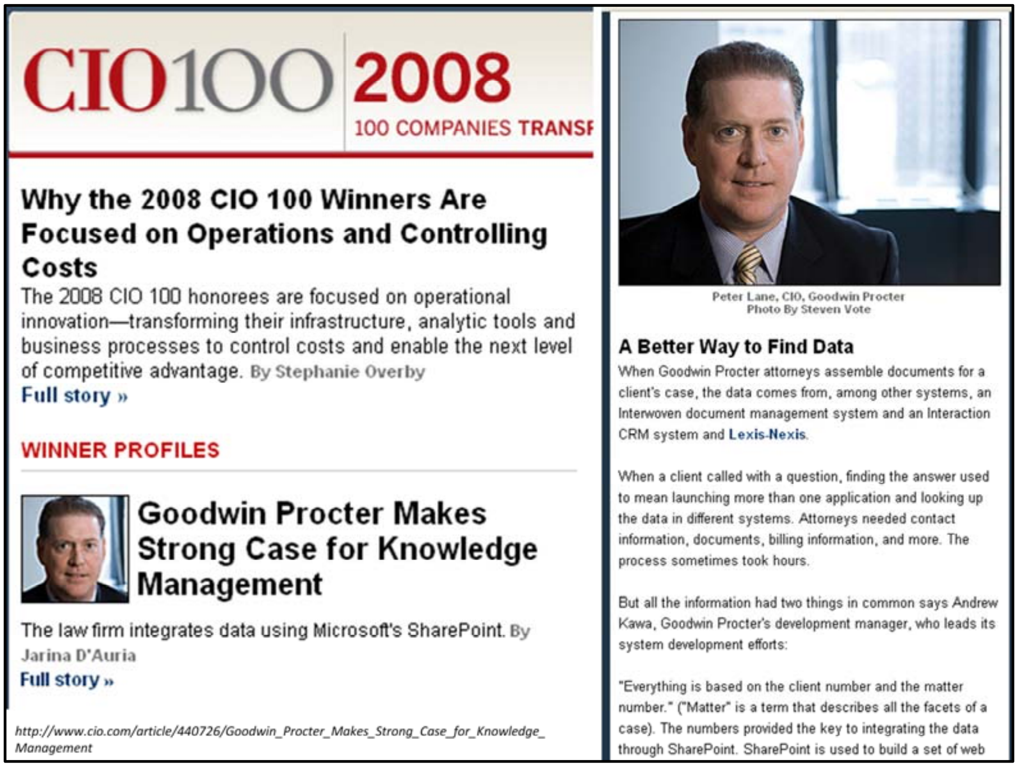
We went through two generations of an html based intranet

For the third generation of the intranet, we ran into the concept of portals.

The intranet will pull information from other systems inside the firm. It looked real attractive to get content from other sources and put in context with some of our other sources

At that time, Microsoft had just come out with a new product called SharePoint that had a lot of tools that seemed to work well with what we wanted from the intranet.

This was a dark horse candidate. But we liked the flexibility it offered.



CIO100 2008

100 COMPANIES TRANSF

Why the 2008 CIO 100 Winners Are Focused on Operations and Controlling Costs

The 2008 CIO 100 honorees are focused on operational innovation—transforming their infrastructure, analytic tools and business processes to control costs and enable the next level of competitive advantage. By Stephanie Overby

Full story »

WINNER PROFILES

Goodwin Procter Makes Strong Case for Knowledge Management

The law firm integrates data using Microsoft's SharePoint. By Jarina D'Auria

Full story »

http://www.cio.com/article/440726/Goodwin_Procter_Makes_Strong_Case_for_Knowledge_Management

Peter Lane, CIO, Goodwin Procter
Photo By Steven Vote

A Better Way to Find Data

When Goodwin Procter attorneys assemble documents for a client's case, the data comes from, among other systems, an Interwoven document management system and an Interaction CRM system and Lexis-Nexis.

When a client called with a question, finding the answer used to mean launching more than one application and looking up the data in different systems. Attorneys needed contact information, documents, billing information, and more. The process sometimes took hours.

But all the information had two things in common says Andrew Kawa, Goodwin Procter's development manager, who leads its system development efforts:

"Everything is based on the client number and the matter number." ("Matter" is a term that describes all the facets of a case). The numbers provided the key to integrating the data through SharePoint. SharePoint is used to build a set of web

The sharepoint based portal was wildly successful.

Information that was in different systems could be pulled into one place and put in better context.

So we could take the documents from the document management system, and display in the context of the information from the billing system and next to the contacts in the contact management system.

The Firm won a CIO Award for the system.

After a few years, Microsoft came out with a new version of SharePoint called SharePoint 2007.

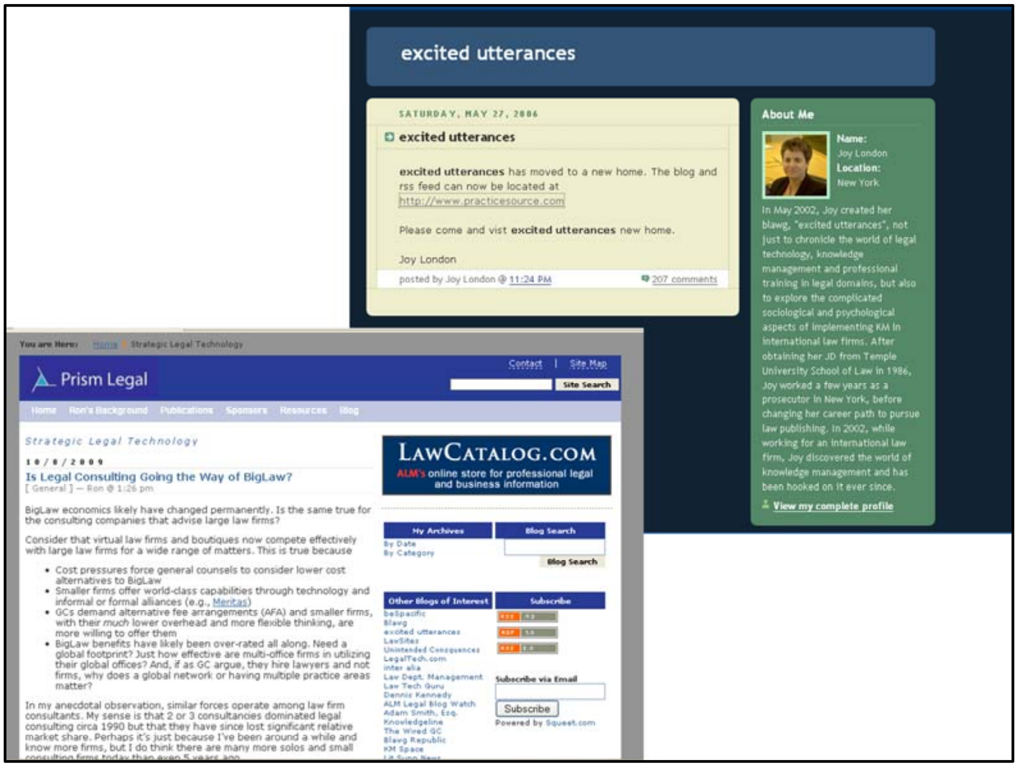
This version included these things called blogs, and wikis and RSS feeds. Things that at the time sounded more like a Dr. Seuss book than tools for a law firm or knowledge management.

But I did some research and they sounded interesting and promising for knowledge management.

Email was becoming overwhelming. Could these tools be another way to communicate.

But I would have to wait a year plus for the team to implement this latest version of SharePoint to start using these tools.

Or would I?



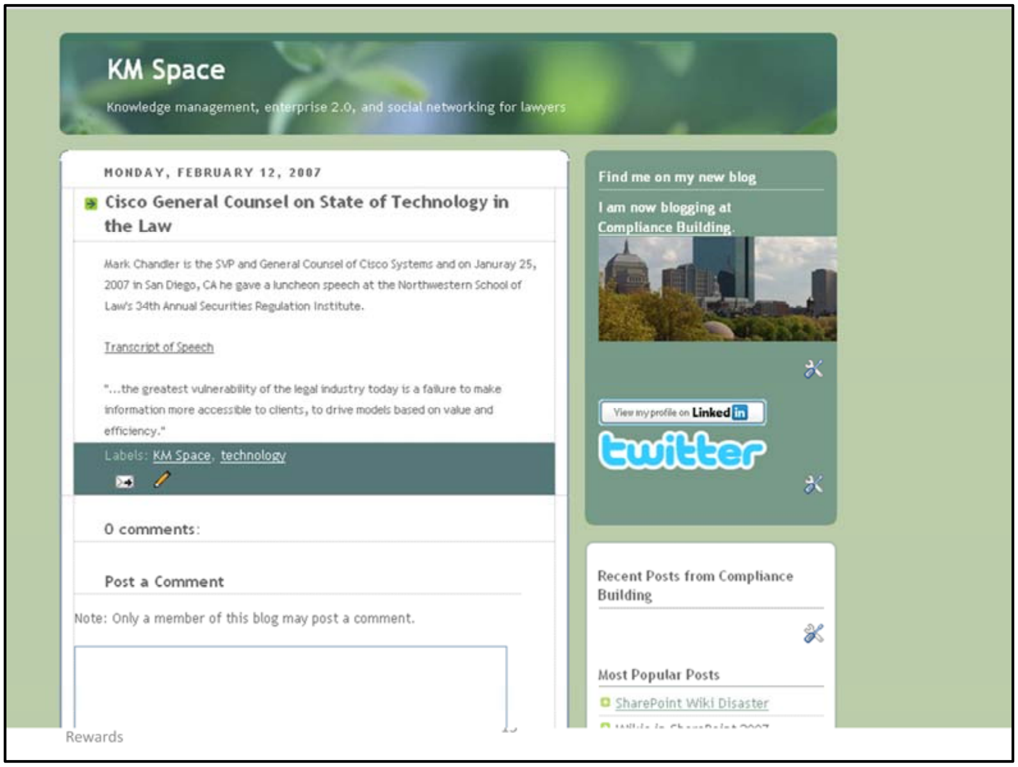
It turns out that two of my colleagues in the legal knowledge management community were publishing blogs. I thought they were just websites.

Ron Friedmann published Strategic Legal Technology and Joy London published Excited Uttterances.

They collected all this great information and made it available. They were doing externally what I wanted to do internally.

So I set aside an entire afternoon to try setting up my own blog.

[anyone want to guess how long it took]



That was the start of KM Space.

This is my first blog post I ever made.

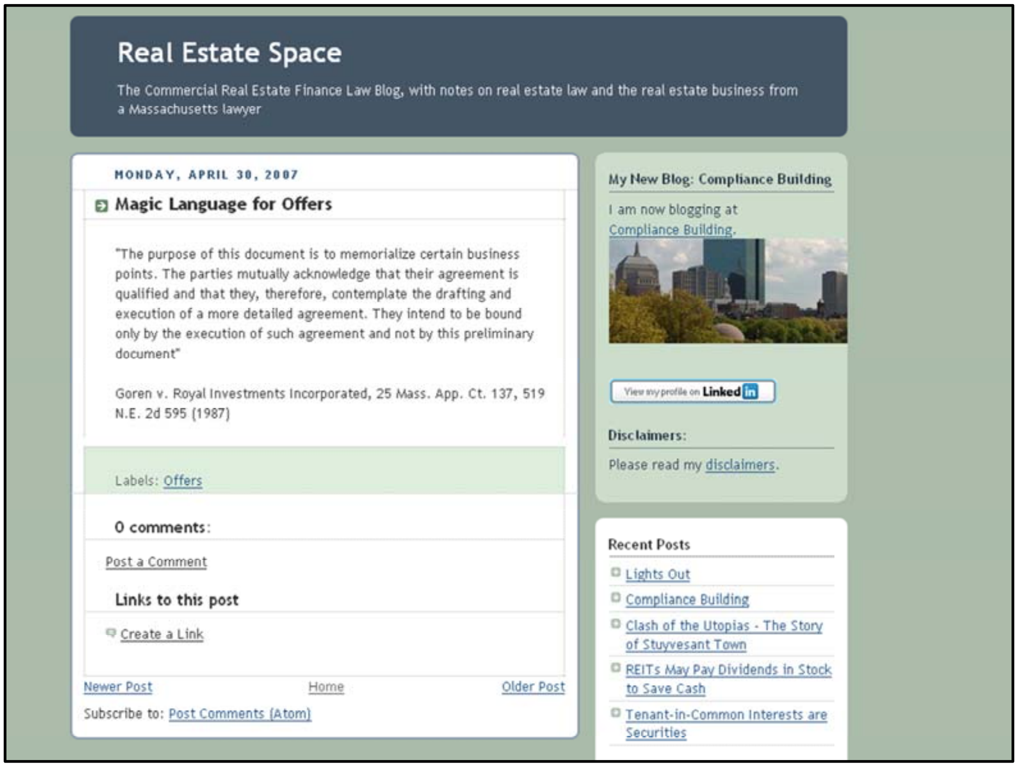
I focused on knowledge management for lawyers.

For me, blogging has always been about personal knowledge management. I put up posts to memorialize interesting things I find. I put up posts to help me focus my thoughts more coherently.

Blogging is part of my learning process.

For me there is this virtuous circle of writing about a topic, that makes you better understand it, learn about it and end up writing more about it.

I know that blogging has helped me to better understand the substantive information that I need to do my job.



I was also practicing real estate law at the time, so a few months later I set up "real estate space" to capture bits and pieces of information I needed to remember.

This was the first post, capturing the magic language I need to put in an offer. Same thing. I was capturing information I needed as a real estate lawyer.

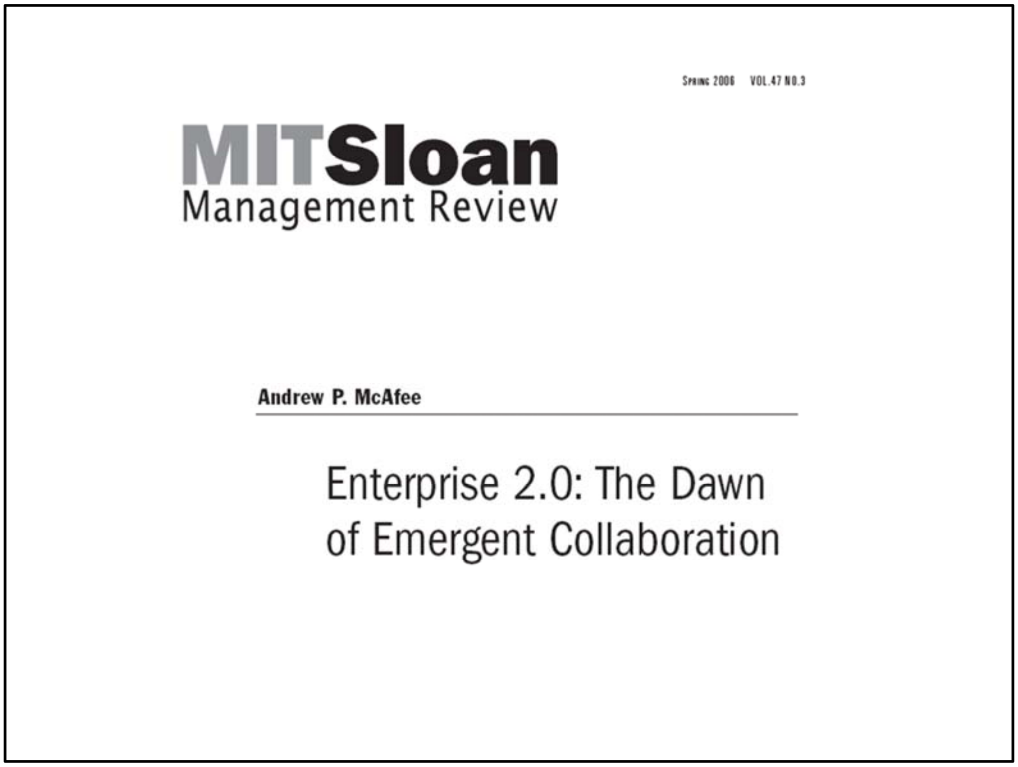
I found blogging to the gateway drug into web 2.0

I found all these other great Web 2.0 tools.

They were great ways for capturing and managing stuff. Great models for knowledge management.

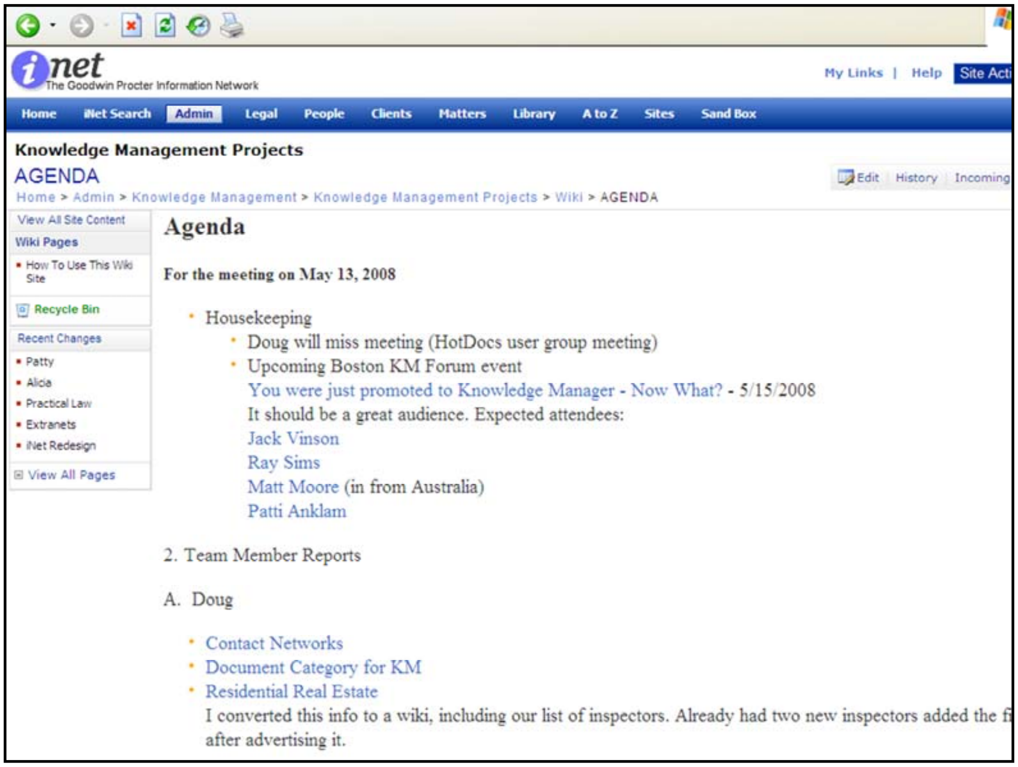
And they were better than anything we could install internally.

The KM team set up a wiki on an externally provided platform. We were using these tool in the context of knowledge management, well before we were able to implement an internal equivalent.



I also discovered Professor Andrew McAfee, who coined this term Enterprise 2.0. In part focusing on what happens when you bring web 2.0 tools inside the enterprise.

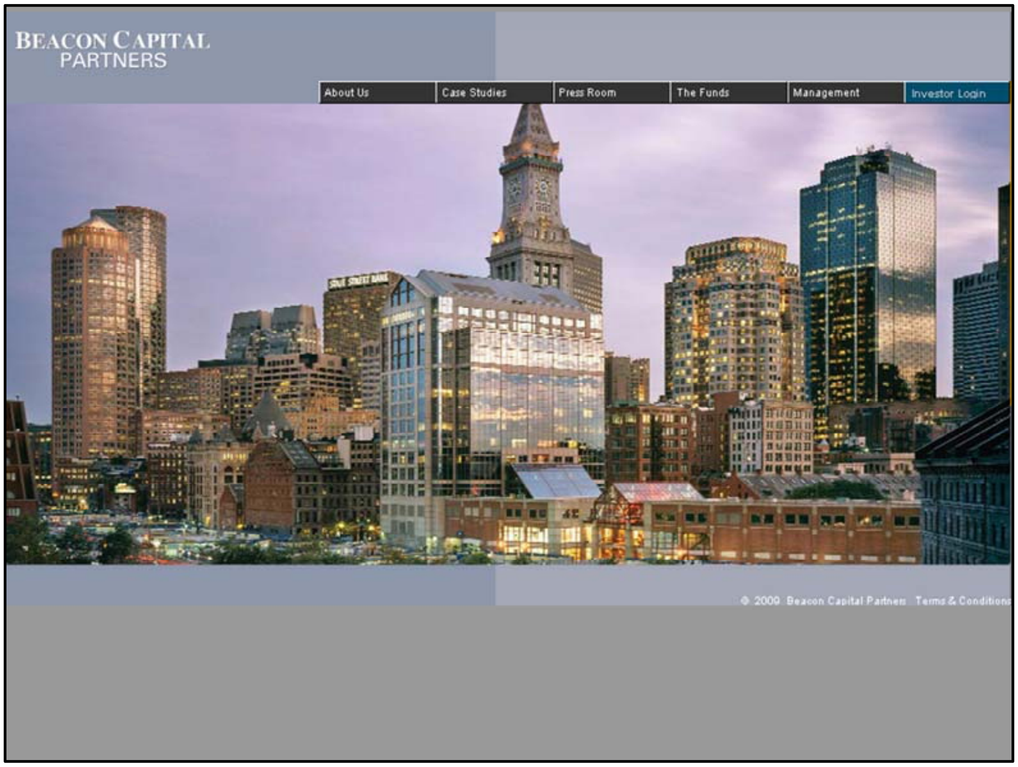
I saw lots of commonality between enterprise 2.0 and knowledge management.



We eventually upgraded the intranet to SharePoint 2007 and implemented blogs and wikis internallu.

We ended up transferring our wiki from the external platform into SharePoint 2007 when we finally got it set up.

It turns out that this big expensive tool was less powerful than the free one we were running externally.



Then, a little over a year ago I got this great offer from Beacon Capital Partners

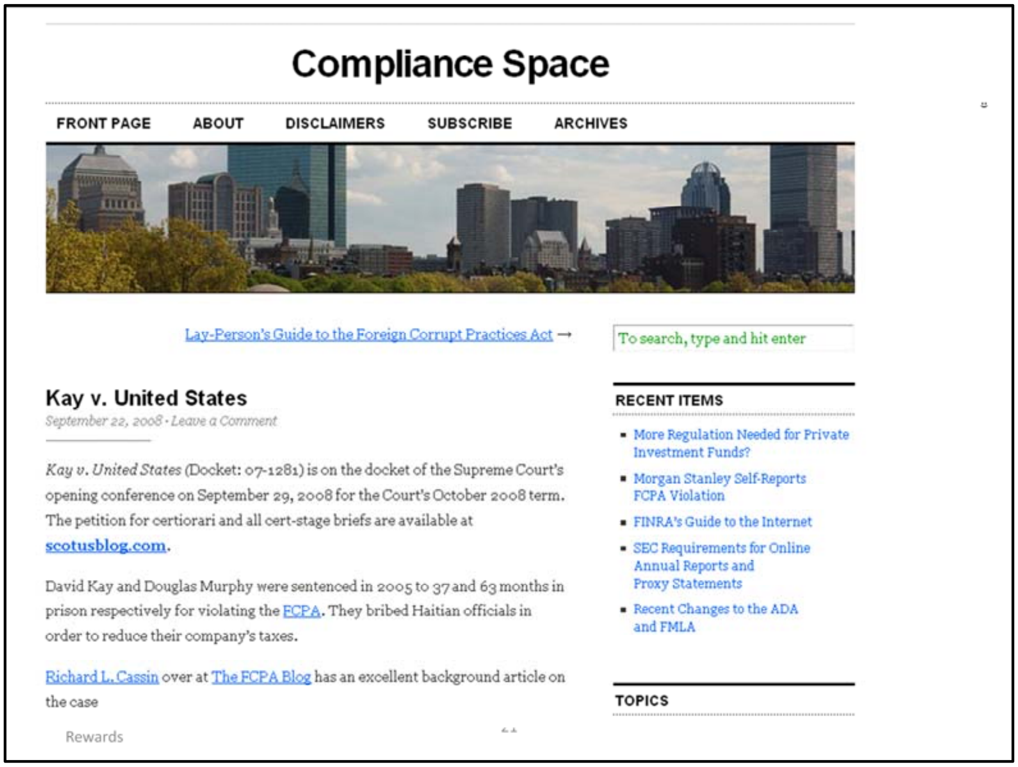
It was incredibly successful firm with a long track record of success.

They were looking for a Chief Compliance Officer.

So I switched careers, going from knowledge management and real estate to compliance and real estate.

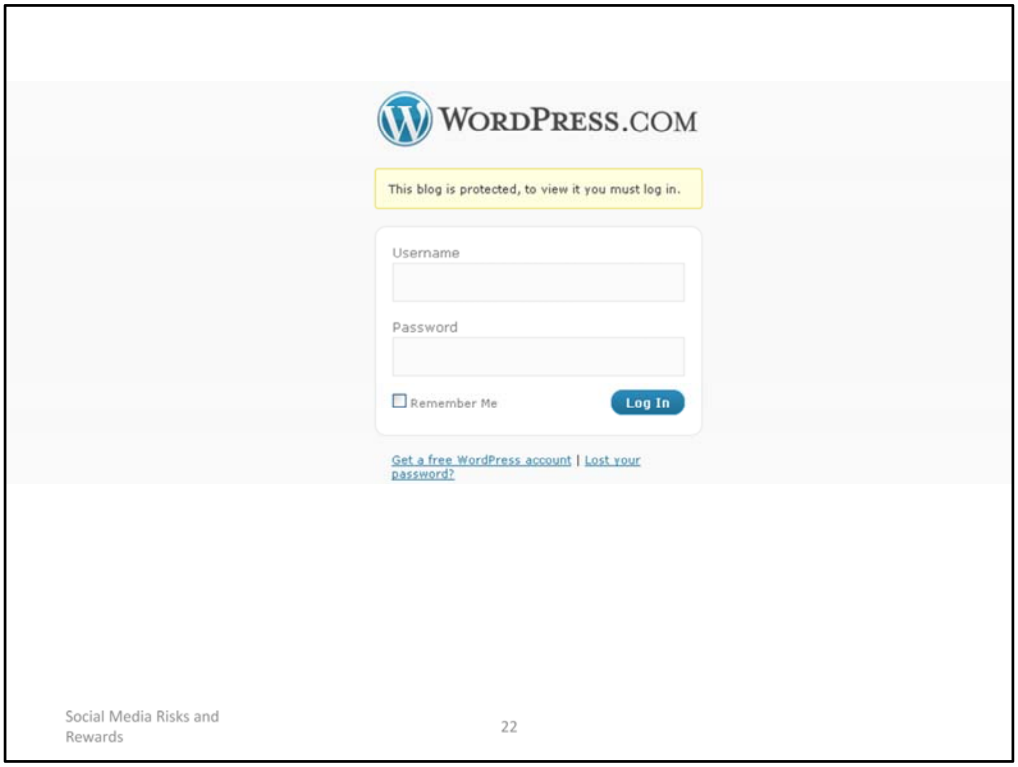
But I had a lot to learn. Compliance involves lots of different areas and lots of different laws and regulations that I needed to learn and learn quickly.

So what did I do?



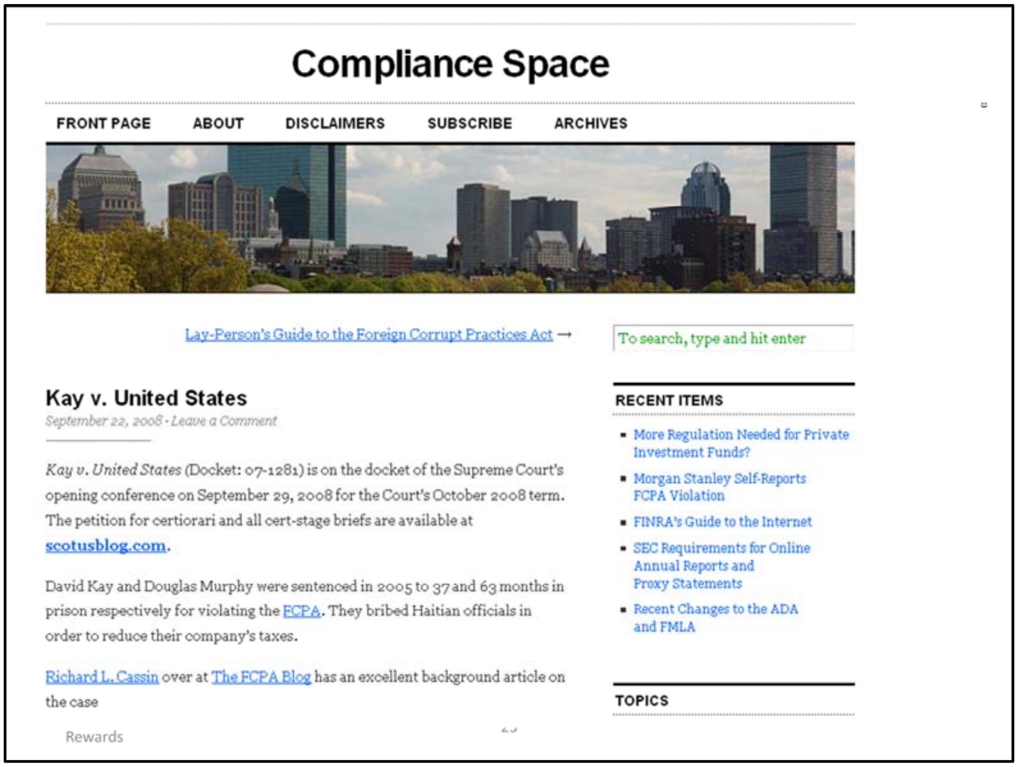
I set up a new blog, focused on compliance.

So I used a blog as a learning tool. I went from KM Space to Compliance Space.



But you wouldn't be able to see it.

Compliance Space was a private blog, hidden from the public eye. I was merely collecting notes. Much of it was law school basics.



I would take notes on seminal cases, statutes, and regulations.

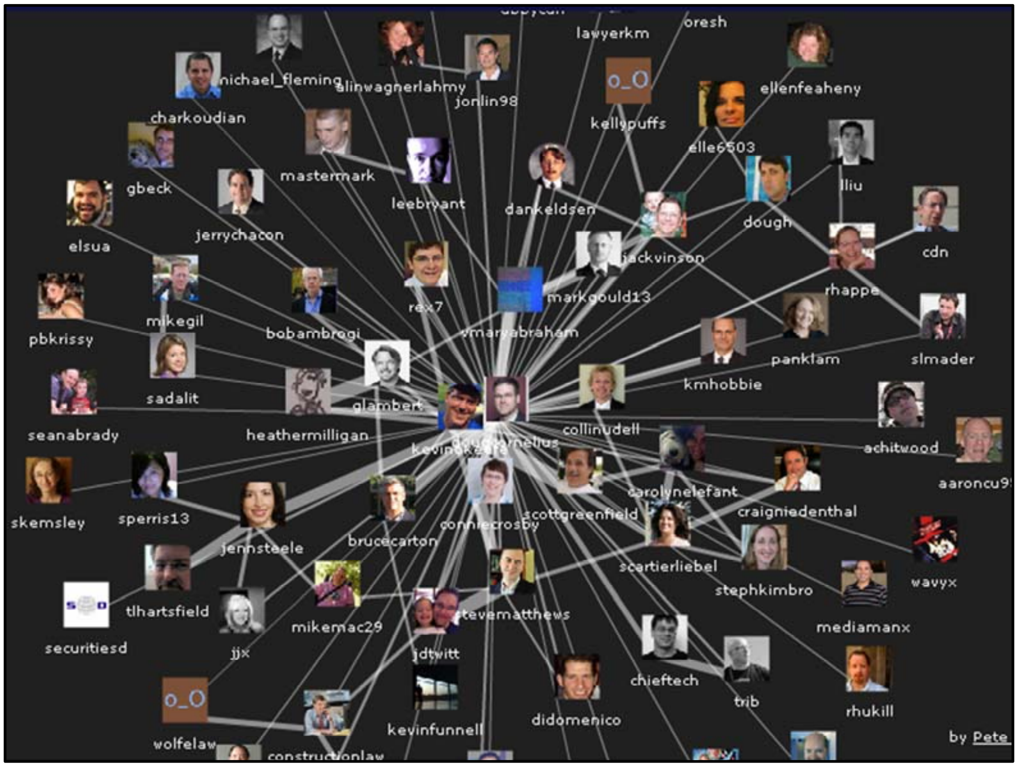
This was the first post at Compliance Space, reviewing Kay versus the United States, which is one of the few appellate decisions on the Foreign Corrupt Practices Act.

Eventually, I built up my core understanding and starting moving to the new topics and discussions that were happening in the compliance field.

With that cycle of learning, I felt that I had enough insight that it was worth sharing with the public. I presented it to my compliance committee. Drafted a social media policy. And took it public

I decided to shift blogging platforms a little and take a deeper step into blogging. Since Compliance Space .com was already taken, I went with Compliance Building .com.

The virtuous cycle continues. I want to publish a new post each day, which means learning something new each day.



One of the reasons I wanted the blog to go public was to develop a network of other compliance.

Patti Anklam will speak more about the network effects of personal knowledge management.

(Image was generated by http://twitter.mailana.com)

What's In It For Me?

Davenport and Prusak , Working Knowledge:

"People rarely give away valuable possessions, including knowledge, without expecting something in return."

In Working Knowledge, Davenport and Prusak point out that people rarely give away stuff for free. People are not going to give away their knowledge for free.

Lots of early generation knowledge management systems looked to the effects of altruism. Contribution was good for the enterprise. People would be evaluated on the extent and quality of their contributions.


Image is by Paul W. http://www.flickr.com/photos/paul-w-locke/3471607187/

The extension of that concept is what Davenport and Prusak call a marketplace for knowledge.

Knowledge is exchanged, bartered, bought, found and generated throughout an organization.

But the revelation for me came when I was thinking about this marketplace concept.

I started thinking about a marketplace for One.

Each of us are are the biggest consumers of your own knowledge.

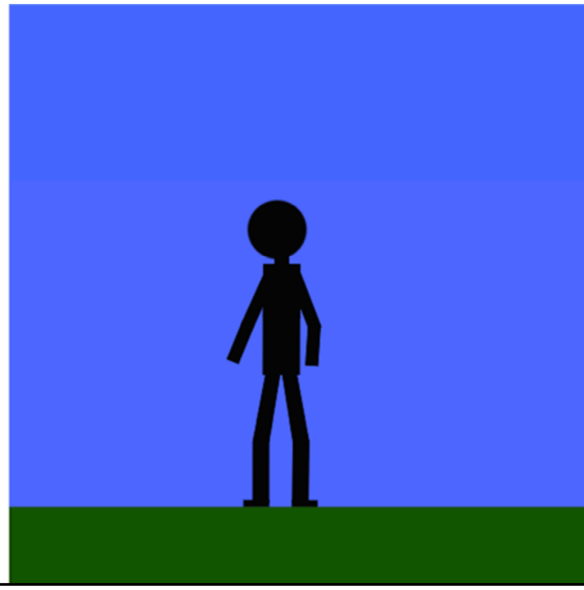
Whenever we are converting some of knowledge into an explicit form or manipulating our existing chunks of explicit knowledge, we are rearranging our own stores, our own marketplaces of knowledge.

If I’m going to invest my limited time and energy, I want a direct and immediate benefit.

I find the Web 2.0 tools to be wonderful tools for sharing knowledge.

[poll on familiarity of these tools]

What's In It For Me?



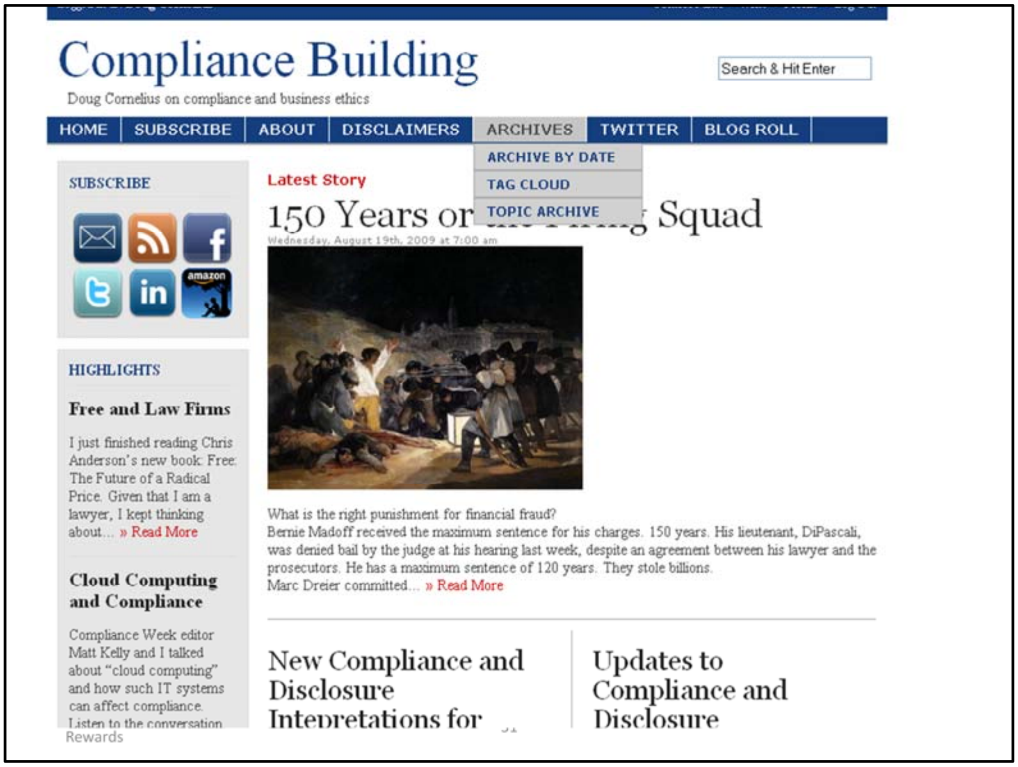
What's in it for me.

So many knowledge management tools expect people to contribute to them because it was for the collective good. Everyone had the benefit of this good work product, organized in the central taxonomy of the firm.

Many companies offered incentives, like gift cards, for contributing to the system. If you have to give away a prize to motivate people to contribute, then perhaps they do not seen enough value in contributing.

What in it for me? Sure, you get the Starbucks giftcard. And you get some smug satisfaction for contributing into the central knowledge system vault.

But does it give me a significantly better way to manage my own personal knowledge..



Going back to my blog,

I write the posts for me, memorializing that information, that learning for me.

The publishing of posts are for my network. But there is very little effort in the sharing, once I've done the learning.

The blog to gives me the ability to organize the posts, by date, specific topics and tags. It also has a robust search feature.

I am the biggest consumer of my blog's material. That anyone reads the blog is a by-product.

It's not the core reason for doing it. Don't get me wrong. I greatly enjoy that people read it and the benefits that come along with it.

But it makes it easy for me to find the stuff I write.

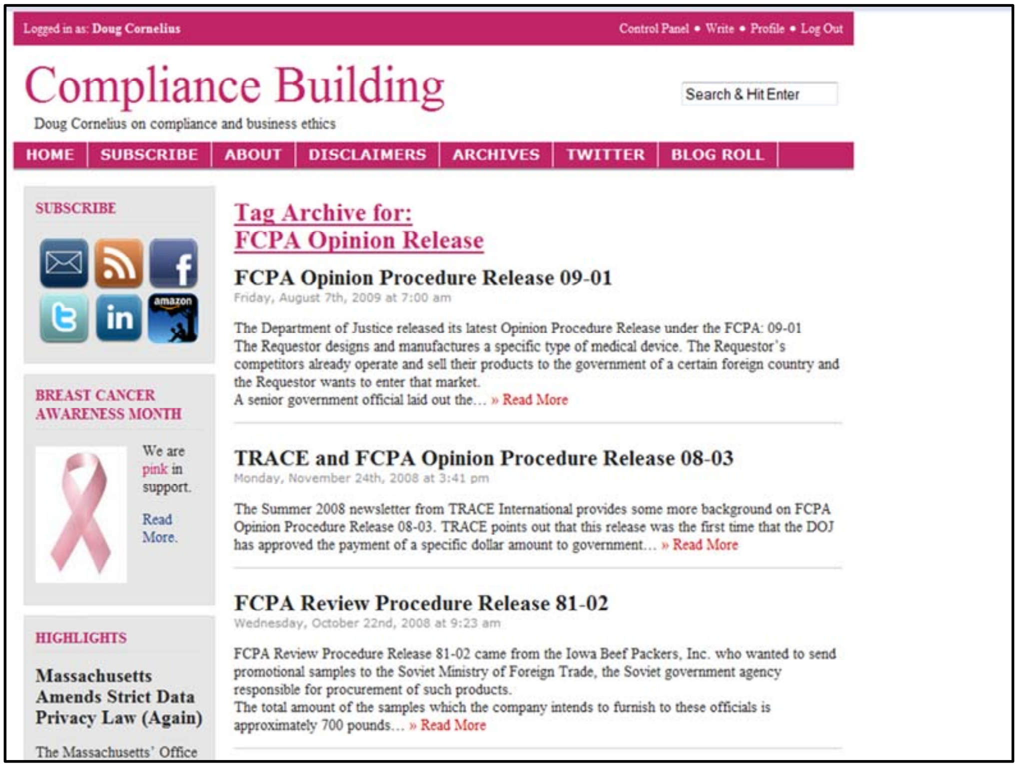
If I remember when I wrote something, I can find it by date. It also helps identify that the information was only good as of that date. Things change.

Or I can find the stuff I wrote because they are organized by topics.

So these are the latest posts on Insider Trading

Or I can get more detailed using tags, adding a different dimension to the organization and more details.

You can see this big “FCPA Opinion Release” tag



You can follow the FCPA Opinion release tag, and see my summary of those very particular rulings from the department of justice.

http://www.youtube.com/watch?v=OXc5ltzKq3Y

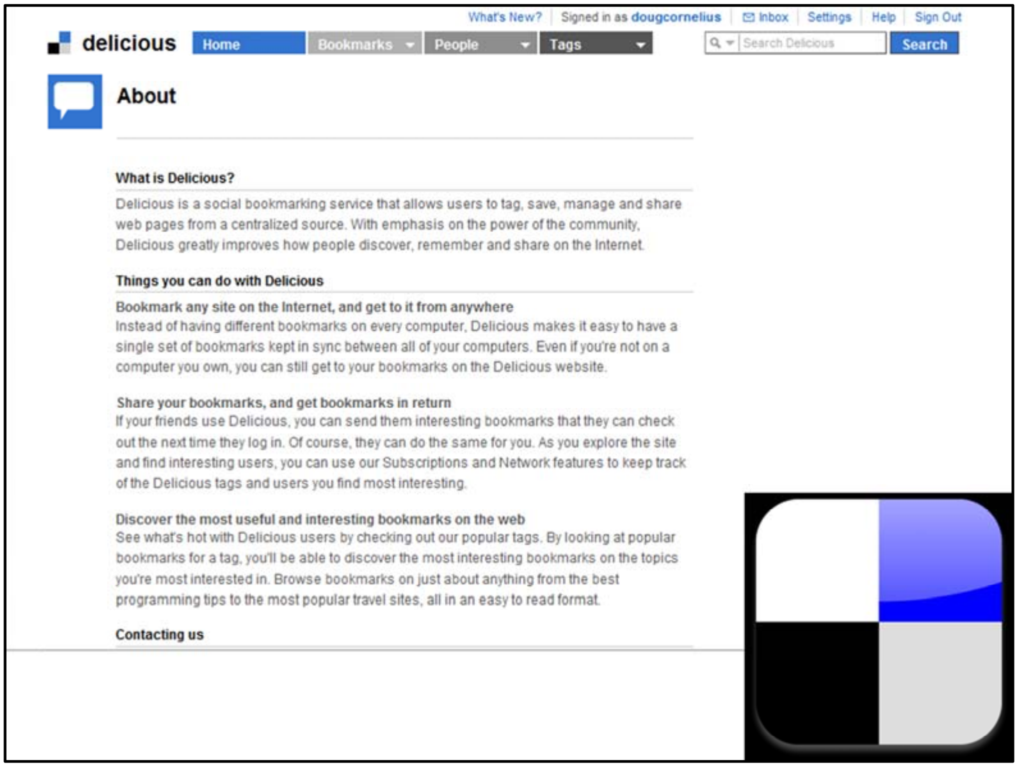
Drinking From a Firehose

The blog helps me deal with the firehose.

It helps me to organize and filter the blast from firehose and is a way to save and retrieve the most important pieces of that information.

I'm going to jump into how some of these other tools help me deal with the firehose.

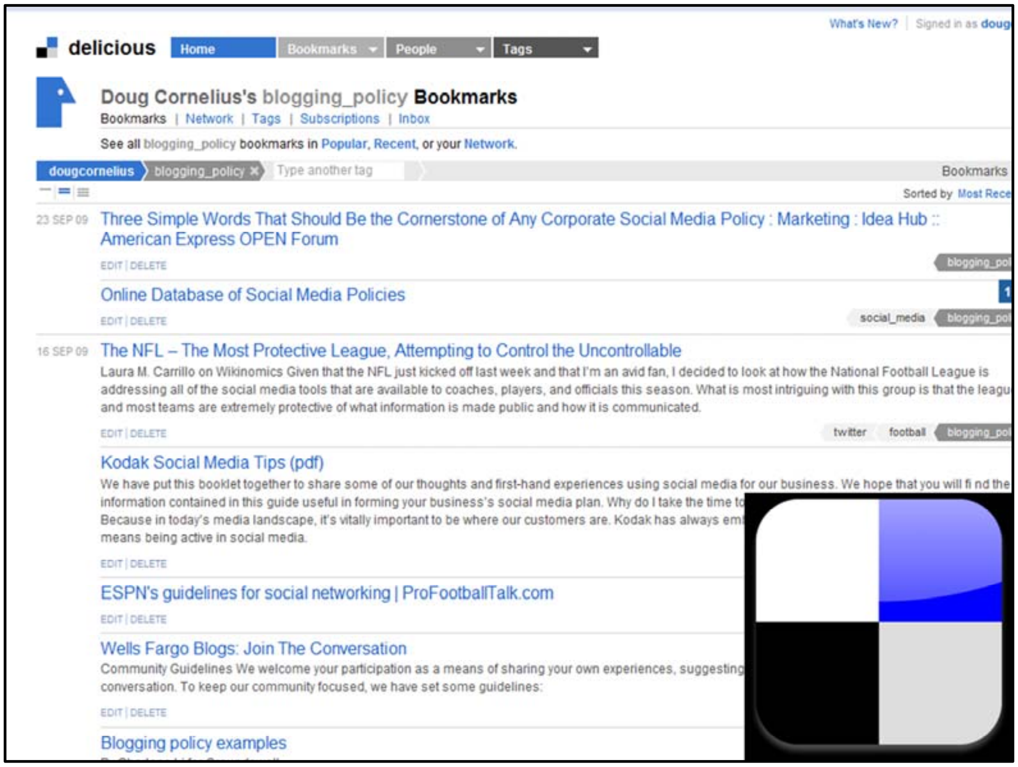
But do so in a way that allows others to benefit from the investment I make.



One way I help to deal with the firehose is Delicious.

I use it collect bookmarks of information that I find useful and want to refer back to some day.

Delicious as a whole acts a filter of the better stuff. It allows you search among the select amount of information that people have tagged and organized

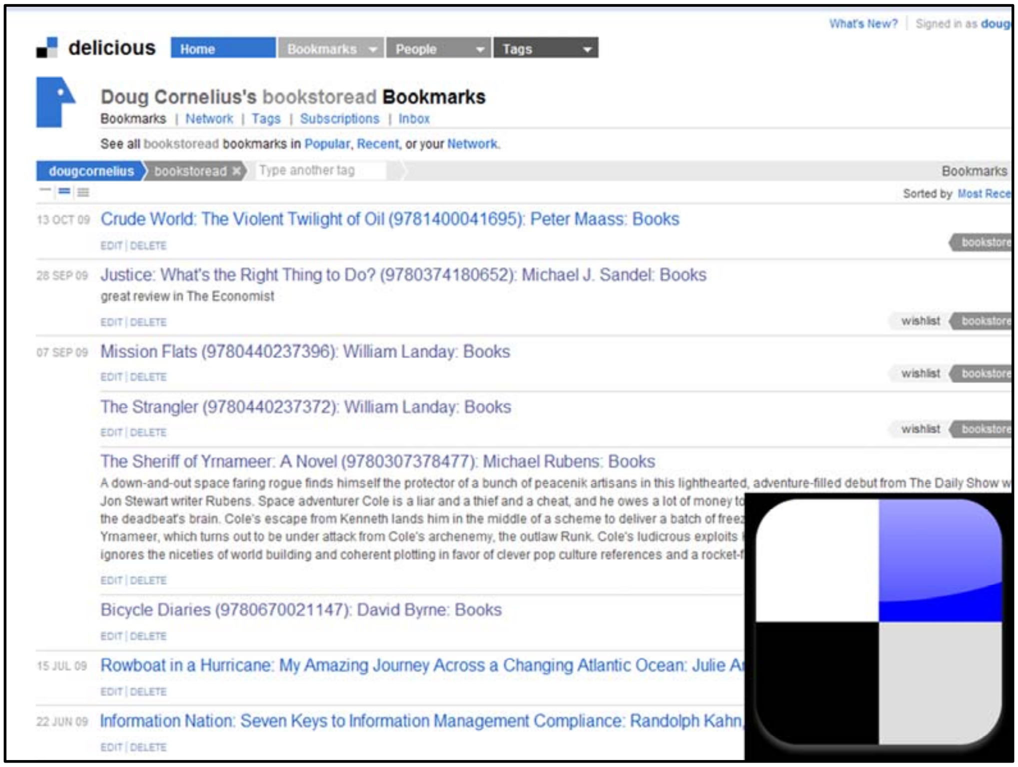


But the direct, immediate benefit is for me. Others have the benefit of my investment in tagging, but the tags are for me.

One thing I use it for is to collect examples of blogging/ Web 2.0 policies an useful articles on what you should include in a policy.

They are organized for me. But they are publicly available so it is easy to share with other people.

If someone asks me, I can share my collection by just sending them the URL. The collection is for me. Others using it is a by-product.

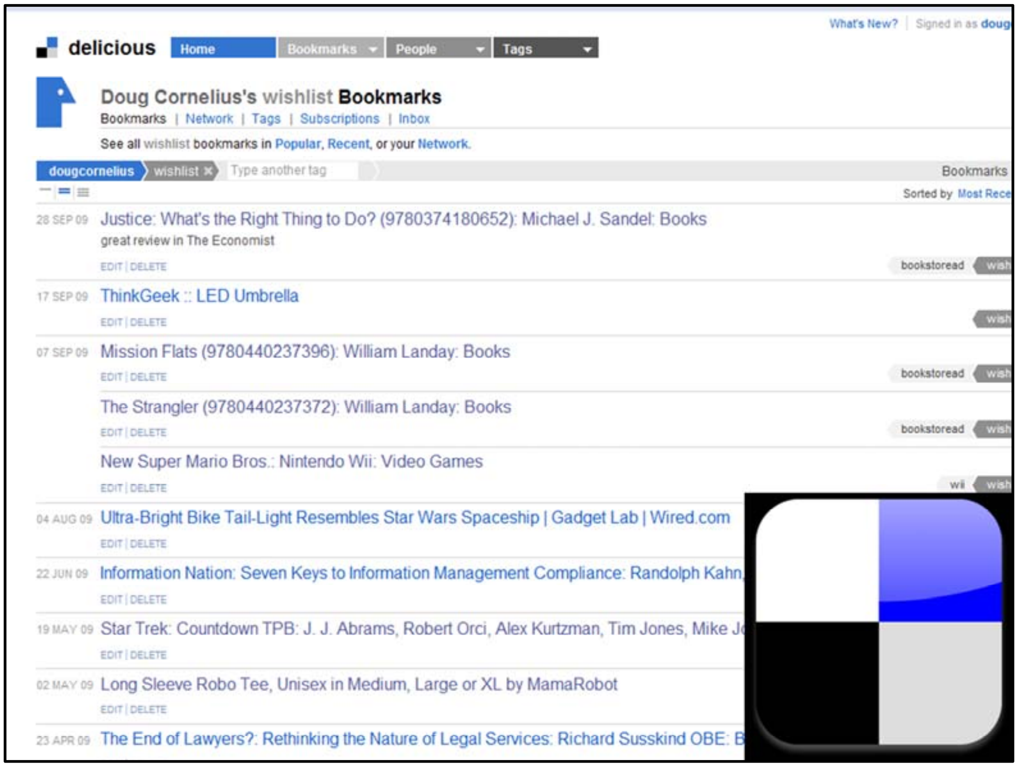


I have another delicious tag for books I want to read.

If I see a review of a good book I tag the review or tag the book itself in Amazon.

Since its in the cloud I can pull it up on my iphone.

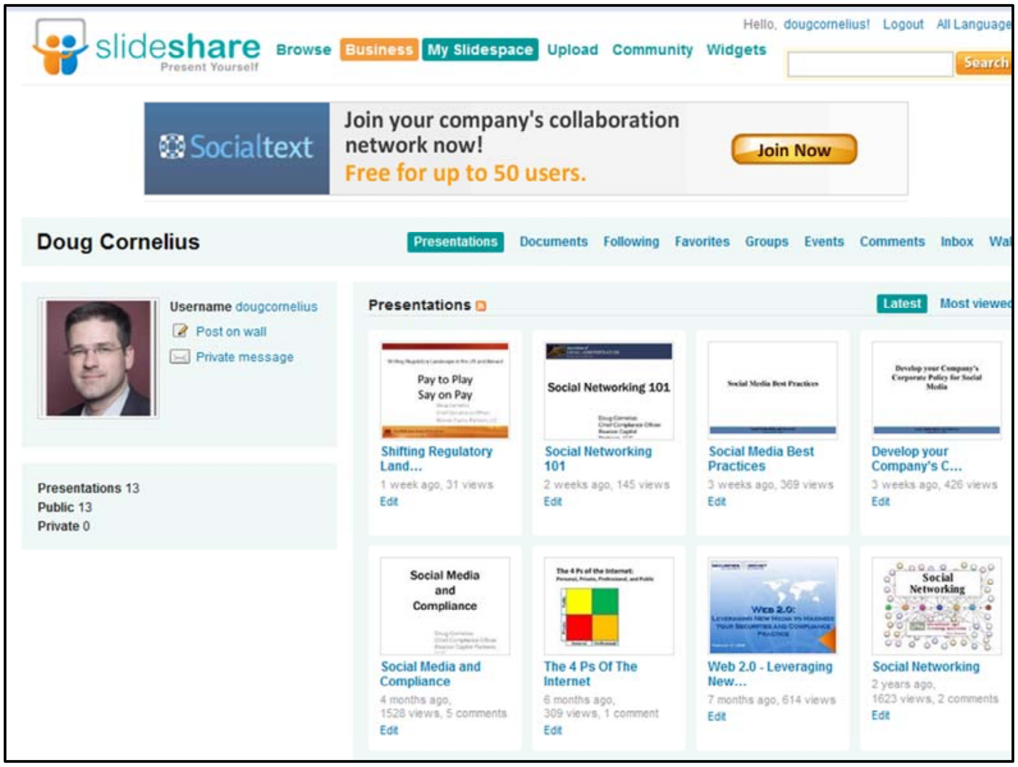
So if I'm in a bookstore or library, I can see the books on my list.



Another example, is Christmas time. My mom and stepmom still ask me for a Christmas wishlist.

How about a Delicious tag for that. I have a "wishlist" tag.

Of course I use if for myself, when I see something I want to get. You can see there is some overlap with the books to read list.



Presentations.

I use Slideshare. Its a way me to collect my presentations, reuse them, publish them. Sure they are shared with the public.

But look at the great things I can do with it.

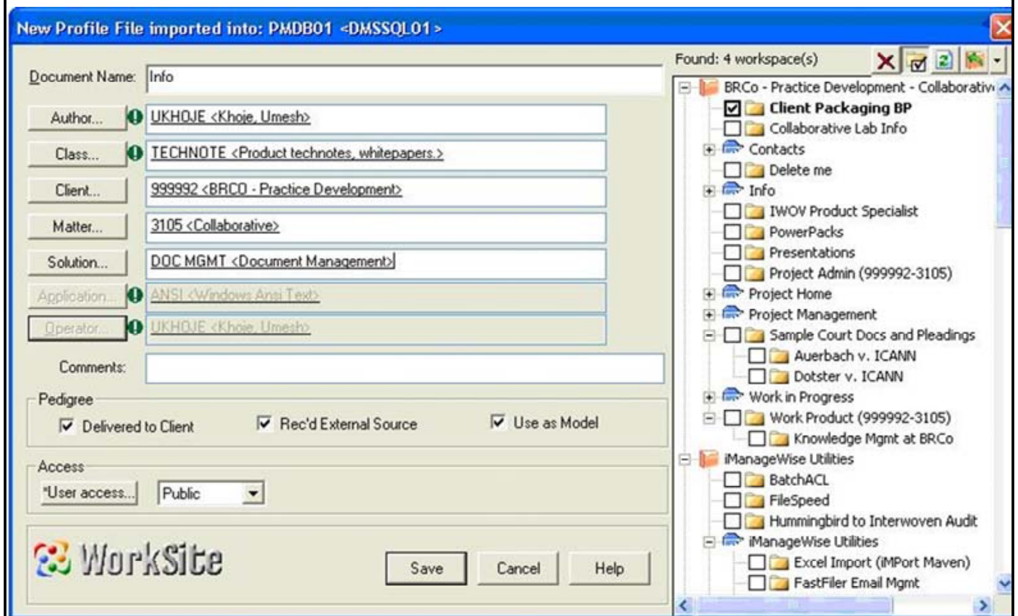
I can “get file” so I can download the file and reuse. (I did for that to get some slides for this presentation.)

So this acts as a simple document management system for me. One that I take with me.

I have these tags and categories to help me organize my presentations and to find other presentations that cover similar topics.

It also make its easy to embed the presentation in a blog post, so I can find it myself and easily share it with others.

Does your internal system allow the ease of sharing and ease of use?

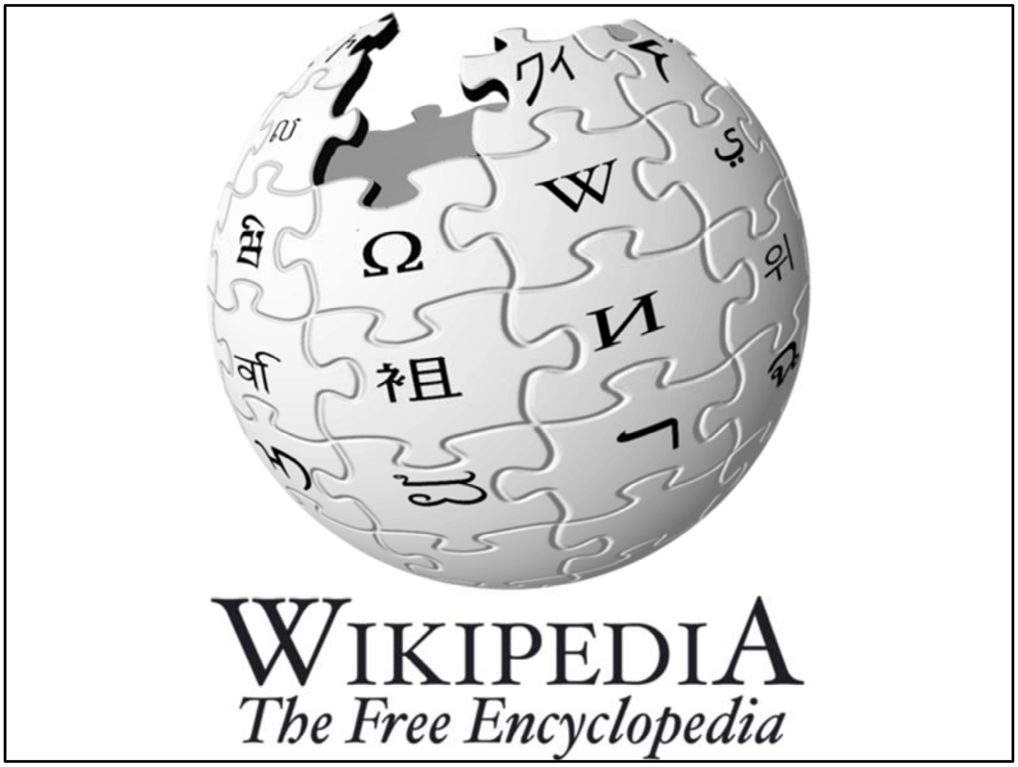


Lets looks at the ability to organize information in these tools compared to the organization tools in a typical document management system.

Do you have a rigid taxonomy and filing structure in your knowledge management tools?

It may be Good for the company.

But it how well does that meet an individuals' needs for organizing my documents?



We here a lot about wikis as a great KM tools.

Wikipedia gets thrown out as a great Web 2.0 example. In particular, it telling to see the difference between a peer controlled review of articles in Nupedia that was the original project. Wikipedia was just a side project to help manage the review of articles.

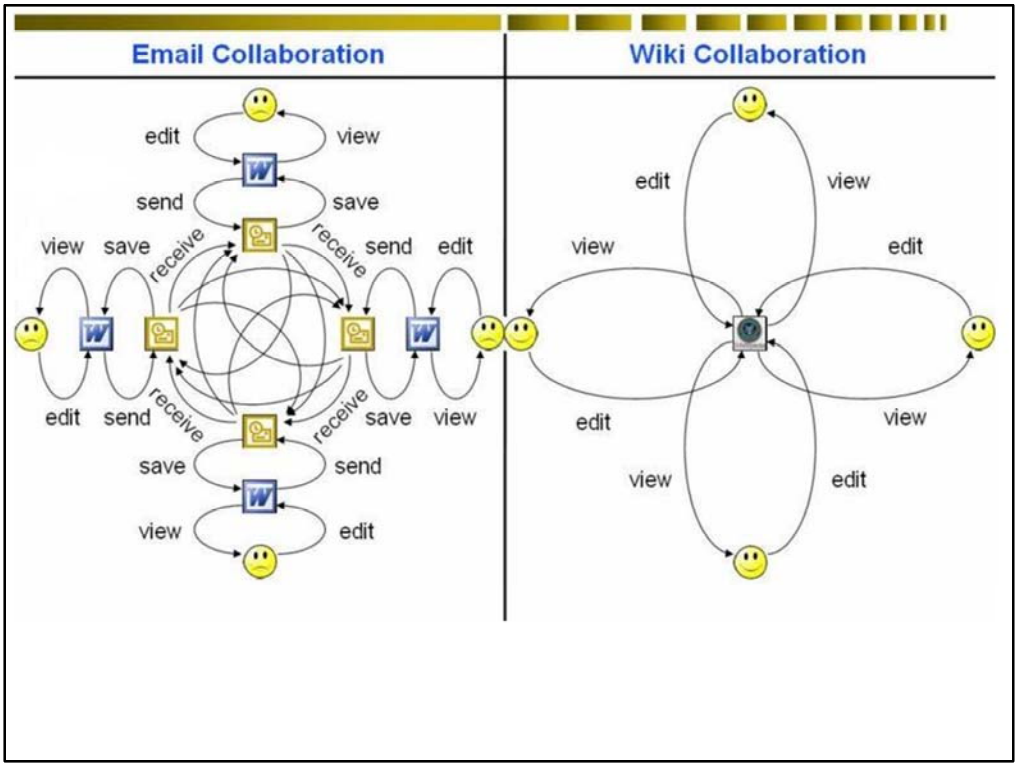
They discovered that removing the barriers to contribution greatly increased collaboration.

But I think the wikipedia model is poor example for personal knowledge management.

The contribution rate in Wikipedia is incredibly low. Only 2 percent of the user contribute the majority of the content and edits.

Although there is a tremendous amount of information, it does not help the individual organize their information.

Wikipedia relies on altruism as the reason for users to contribute information.

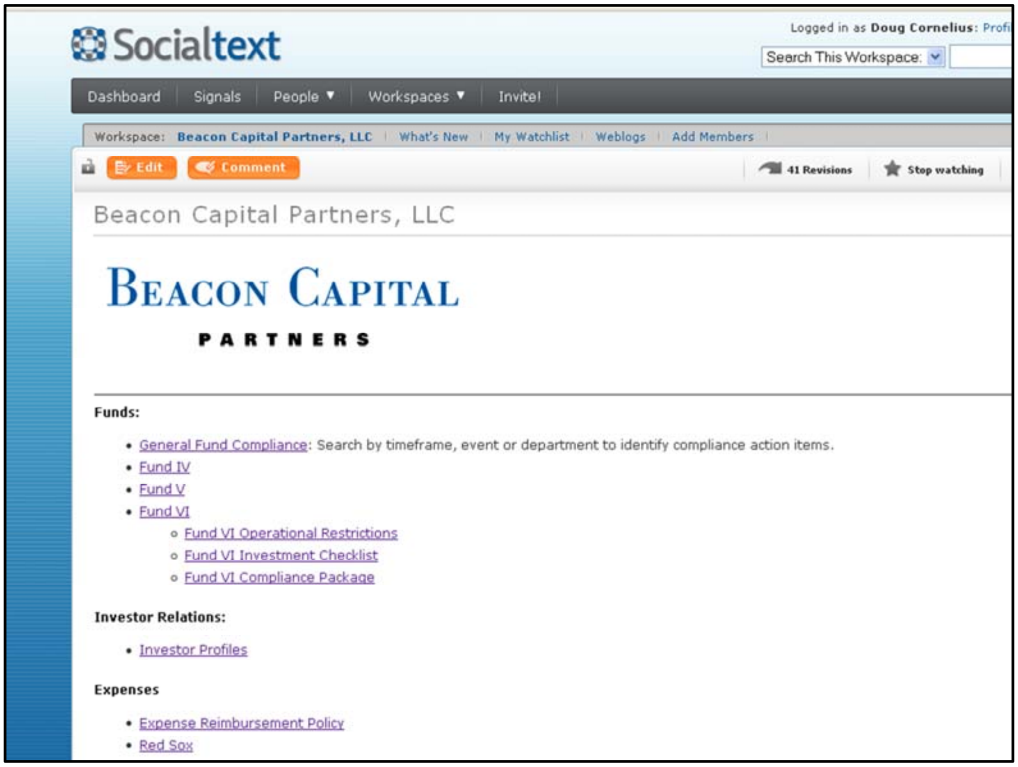


Using a wiki in a small group is better. Focus on a smaller group and help them manage the firehose.

You are replacing one type of communication (typically email) and replacing it with the wiki.

One they can help tame the firehose by cutting down on the amount email and centralizing information to its core.

What about a wiki for one?

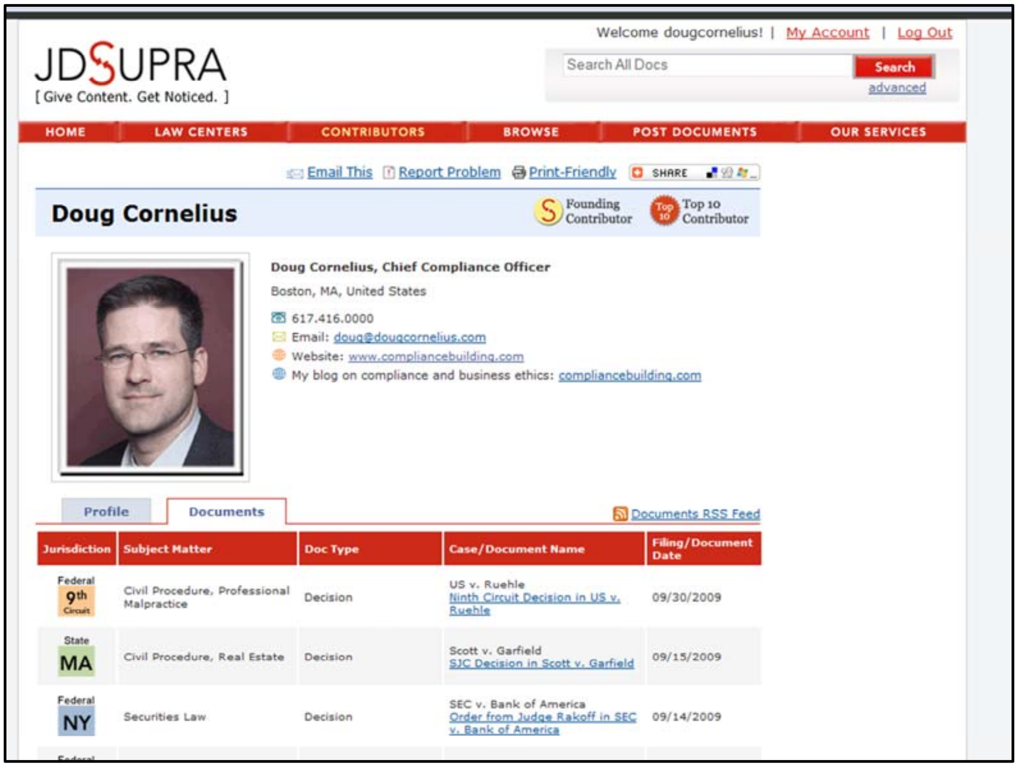


How useful is it?

Very useful. I have one that maintain information.

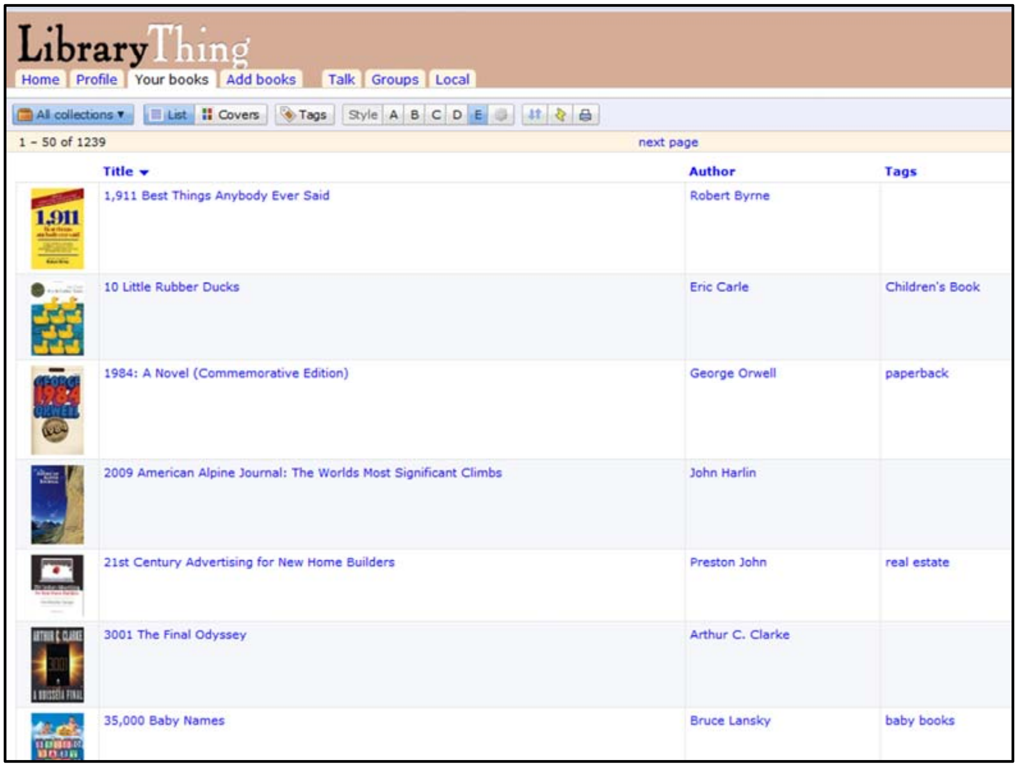
I can link to resources it helps me to synthesize the information for my reuse.

I have not pushed it onto others for use. (That will probably surprise any of you that have heard my wiki evangelism in the past.)



JD supra

An online document repository, targeted at lawyers.

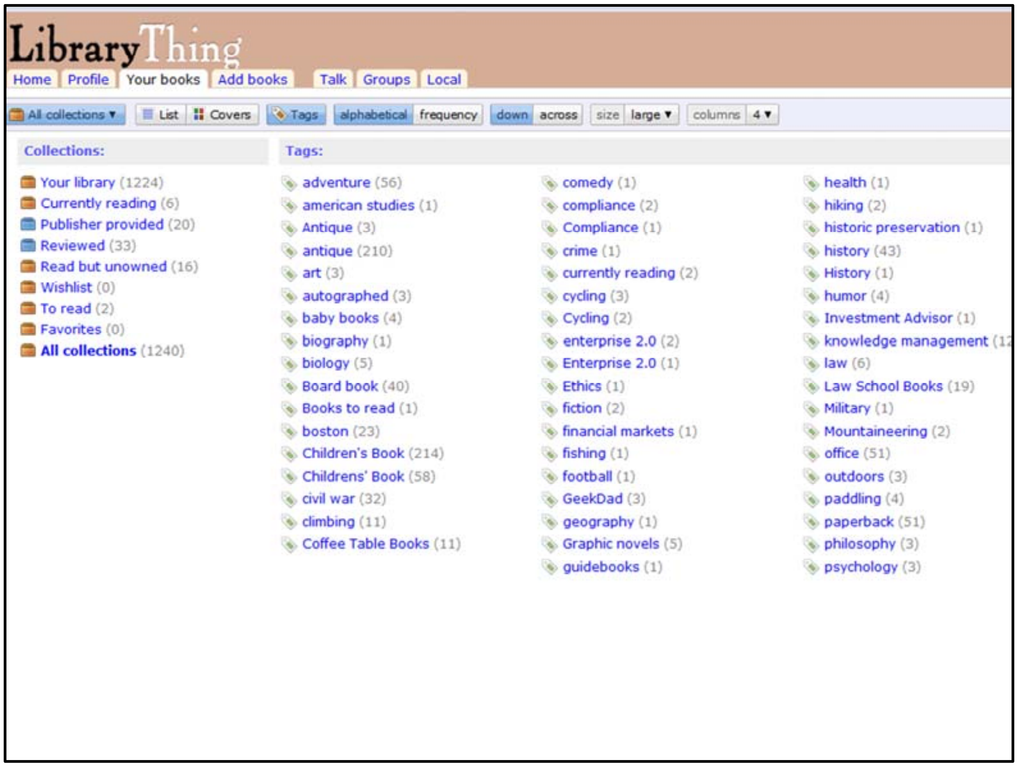


Library Thing

I use a web 2.0 tool, Library Thing to keep track of the books in my library. There is a contribution to the whole. I have a few hundred old books that don't show up in Amazon. That ruled out using Shelfari for this.

[Ray Sims and a prior KM Forum meeting]
[Compare to Shelfari and limitations to Amazon books]

About half of those old books were already in this catalog because someone else entered them. The other half, I entered. So the second person to add the book will already have the existing entry.



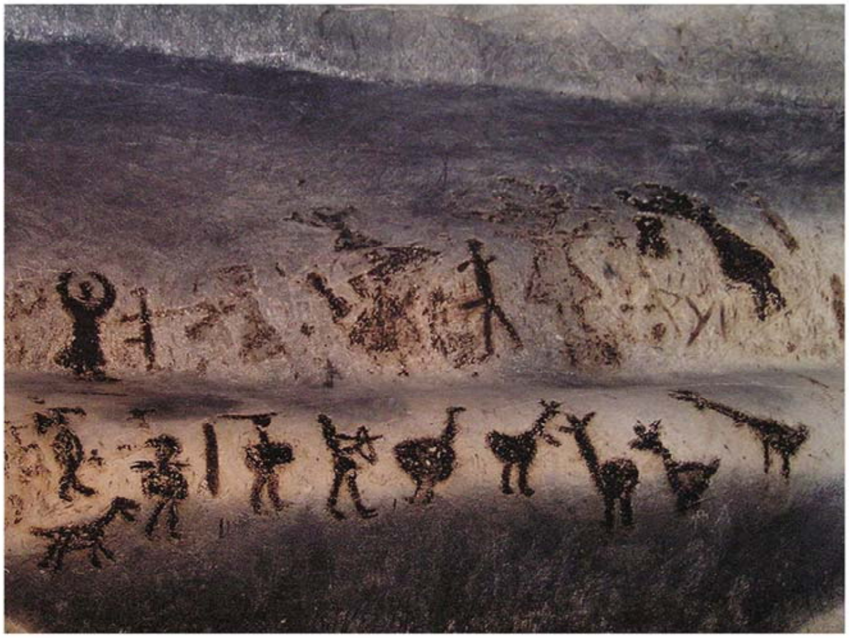
Library Thing helps me to be organize my books in a way that makes sense to me, with the side benefit that it helps others.

To me, that is personal knowledge management.

Those of you with a library sciences background will probably love and hate LibraryThing.

There is a tremendous amount of information about books, all contributed by people organizing their books. Some altruism, but largely self-interest.

But the organization is focused on me. I can create separate collections, I can tag books in a way that helps find the books I'm looking for. It part it may be fairly unique to me, but offers some benefit to others.



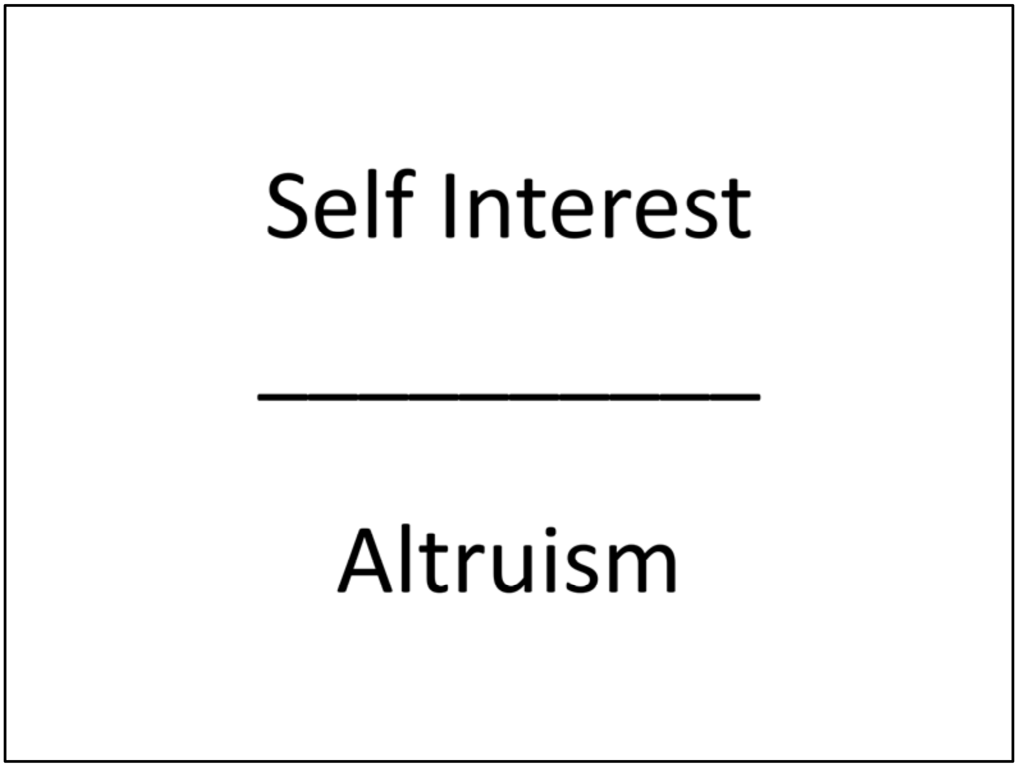
http://commons.wikimedia.org/wiki/File:Magura_-_drawings.jpg

This is not new.

When I look at this cave painting, I think of personal knowledge management.

The caveman wrote down where he found this animal. It helps him to remember where the good hunting grounds are. The side benefit it that others in the cave can also benefit from the painting. Maybe even add their own.

Anyone could write on the cave wall. All you needed was some paint.



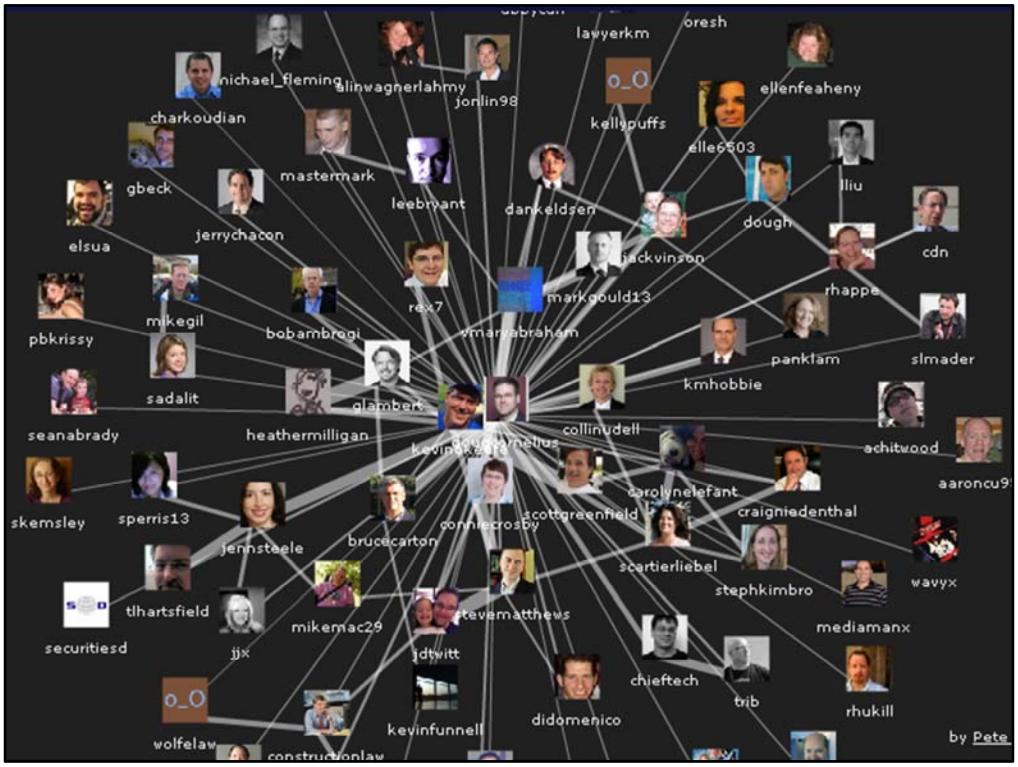
It’s a bit cynical,

Put my view of personal knowledge management is

That Self interest will prevail over altruism.

If you want a knowledge management program to be successful you need to design it so that it gives immediate and direct benefit to the person contributing.

You need to help them deal with the firehose of information pointed at them.



I am a fan of the social network effects of these tools.

But let’s not forget who is in the center of the network.

(Image was generated by http://twitter.mailana.com)

How to Find Doug

- ComplianceBuilding.com
- LinkedIn.com/in/dougcornelius
- Twitter.com/DougCornelius
- DougCornelius.com
- flickr.com/photos/dougcornelius
- LibraryThing.com/catalog/dougcornelius
- delicious.com/dougcornelius