



Executive Action Series



It's Not Just Your Children's Facebook Anymore Using Social Networking to Enhance Knowledge Transfer

by Kent Greenes and Diane Piktialis, with Susan Stewart

The need for sharing and managing a company's knowledge assets has never been greater. Fortunately, the tools for doing it have never been better.

These are important times for knowledge transfer, the act of moving knowledge from those who have it to those who need it. A multigenerational and globalized workforce constrained by cost pressures means that it's harder than ever for companies to exploit their own collective wisdom—and the bigger the company, the tougher the task. In the words of strategist Arie de Geus of Royal Dutch Shell, “Learning faster than your competitors is the only sustainable competitive advantage in an environment of rapid change and innovation.”¹

The increased need for effective knowledge transfer has coincided with the dawn of the perfect toolbox for transferring knowledge: the growing array of options offered by social media. In short: the bad news is that you have globally dispersed employees with different learning styles who need to know more than they ever have, but don't know what they don't know. The good news is that they're all on Facebook.

This doesn't mean your colleagues should be spending their days communicating by poking each other and peppering their work emails with emoticons. It simply means that many employees already have the skills and tools that, when coupled with a dynamic corporate knowledge transfer program, will help them to communicate, connect, and share information and insight more efficiently. Companies that use social media to improve knowledge transfer will see employees benefit from more informed thinking, more and better ideas, and big steps forward in both innovation and efficiency.

Note: This Executive Action Report was adapted from *Knowledge Transfer in a Digital World: Using New Media across Generations and Geographies*, a working report by Kent A. Greenes and Diane Piktialis, based on the 2010 presentations, discussions, and explorations of The Conference Board Research Working Group on Knowledge Transfer in a Digital World.

¹ Arie de Geus, “Planning as Learning,” *Harvard Business Review* 66, March-April (1988): 70-74.



A Brief but Important Distinction

Social media refers to new forms of communication, blending technology with social interaction.

Web 1.0 refers to the early stage of the internet where communication was from one to many.

Web 2.0 refers to web applications that facilitate interactive sharing and collaboration on the worldwide web: social networking sites, blogs, wikis, video-sharing sites, etc. In other words, 1.0 is a speaker with an audience, and 2.0 is a community.

But the use of social media for doing more than simply reaching people is still in its infancy in many companies. While business cases have long been made for knowledge management and more recently for enterprise-wide web 2.0 capabilities, few exist for integrating the two. This will change as surely as the next iPhone app will come, and with good reason. Social media can be a “force multiplier” for knowledge transfer: an engine that significantly increases and multiplies the effectiveness of a person, idea, or group.

Think of knowledge as food. In the old, analogue days, people sat around the campfire, silent and famished as their meal cooked, so that it could be passed around the circle, and everyone could have a bite or two. Slow, primitive, and not exactly made to order.

Enter digital technology, which turns the campfire into a convection oven: it cooks knowledge faster. With the progression from web 1.0 to web 2.0, everybody has his own oven, and people are braising, barbecuing, and baking, each according to preference and skill set—and sharing nuggets of what they need with each other to sustain corporate growth and foster innovation.

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There are more benefits. As employees nosh on the knowledge that's been prepared and disseminated through the tools of social media, they are connecting with each other. (It's not called social media for nothing.) Social media both enables and necessitates personal interaction, bringing employees together in global companies and bridging generations: helping everyone get to the table faster, and giving them a customized and fortifying meal.

When you enhance knowledge transfer with social media, it's a case of two plus two equaling five. Weak ties between employees (through distance in geography, age, or function) become as productive as strong ties, connections become collaborations, and magic happens:

- The company's pool of knowledge deepens
- The knowledge of long-tenured employees is captured and retained
- Talented younger employees are attracted and engaged
- Internal collaboration is possible on a global scale
- Corporate dealings become more transparent, thanks to the inherent openness of most digital communication

A caveat: just as the benefits of this digital alchemy are great, so are the dangers of getting it wrong. Poorly planned social media initiatives can lead to confusion and disengagement. Integration of social media requires a deft touch, light on the authoritative and heavy on the soft skills of connectivity and persuasion. There must be

Exhibit A **Another distinction: Knowledge transfer versus social media**

Knowledge transfer:

- Moves knowledge from those who have it to those who may need it
- Accelerates and improves performance
- Leverages collective knowledge and experience
- Broadens expression

Social media:

- Enhances communication
- Expands personal networks
- Creates and leverages community
- Organizes without organizations

Think Soft: Making the Business Case

Because social media applications are still in their infancy, most don't easily fit into traditional cost-benefit models. But that doesn't mean you can't make a compelling argument for bringing your company into this new world. Successful business cases will likely include the following elements:

- A sense of urgency, which you create by focusing on benefit to core business functions rather than discretionary ones
- The early engagement of key leaders and stakeholders
- Acknowledgement of the worst fears about social media
- Management of expectations about what social media can and cannot do
- Selection of improvement opportunities that can be measured, if hard ROI is critical
- Selection of “softer,” more qualitative results (e.g., adoption, uptake, satisfaction) for measurement, if hard ROI is not critical

a recognition that employees are all at different places in their web journeys: older “digital immigrants” may need handholding and cheerleading as they post their first microblogs, while younger “digital natives” may need to be restrained or at least taught the difference between using social media professionally and personally (no pokes at work—really).

There also must be a system in place for managing the often overwhelming amount of information that social media creates (just look at your email inbox). Integration of social media and knowledge transfer is a business initiative like any other. It requires a plan, support of upper management, a budget, guidelines, and a way to judge its effectiveness. It also requires sensitivity that may seem counterintuitive, and an overall understanding that this is a new landscape that demands new (as well as proven) insights:

Start with the problem, not the solution Every professional organizer will tell you: don't buy the cute boxes and files until you figure out what goes in them. By the same token, don't commit to a lot of pretty social media tools until you have determined exactly why you need them and what you will do with them.

Confront worst fears early Be prepared to deal with legal departments, risk management experts, and other potential naysayers who are paid to worry about transparency and unexamined knowledge. Policies can go a long way toward getting people on your side.

Acknowledge that age matters Bias against social media based on generational perceptions can be a powerful barrier to adoption. Embrace the need of each generation to learn in its own way.

Remember that people are social by nature, and should be encouraged, not forced, to adopt social media Mandating these tools goes against the concepts that make them work. They are all about community. Remember this as you make the decisions that define their use.

Be sensitive to schedules and time constraints People are overworked, and many may see new systems as creating additional toil. Make sure that what you are offering will ultimately make employees' lives easier, and take the time to convince them of this.

Know that you can lead a horse to water, but you can't make him drink The best social media or knowledge transfer system won't be effective if it doesn't invite participation. Make your system easy to use, and make this ease apparent to everybody involved. Use regular people to teach social media use and techniques; they will be easier to follow and understand than the most brilliant geeks.

Start small whenever you can Pilots and projects within departments and business units are easier to engineer and generate faster results. So unless you need critical mass (say, for a company-wide wiki), produce a small victory and then, as quickly as possible, capitalize on its momentum by going wide.

Acknowledge that one size doesn't fit all Some companies are further along with social media because of urgency, leadership interest, or the very nature of their business. Others require a business case. Some flow from the top, while others begin as grassroots experiments. Start locally, and fit your approach to your own culture.

Manage measurement expectations How do you catch a wave upon the sand? Social media is about the flow of knowledge, not knowledge as a commodity. So companies looking for hard ROI models in this area may be disappointed. That doesn't mean you shouldn't target strategic or operational improvements. After all, why are we doing this? However, experts suggest measuring "soft" factors such as adoption, uptake, satisfaction, quality, and efficiency.²

Be open to, well, everything These are early days for enhancing knowledge transfer with social media. Don't be rigid in your actions or your ideas, because things are changing faster than you can anticipate or imagine.

Once all systems are in place, you are ready to integrate social media into your current knowledge transfer system. That, however, assumes that you have a formal or explicit knowledge transfer system in the first place. (See box on page 8 for a brief summary of types of knowledge and steps in knowledge capture, transfer, and retrieval, as well as some common knowledge transfer methods.) Many knowledge transfer methods (wikis, podcasts, and communities of practice) naturally use social media, but that doesn't mean that integration of the two is a foregone conclusion.³ Fitting the two together means fitting the medium to the message; the core of knowledge transfer-social media integration (Table 1, page 5).

Social media fertilizes, activates, and grows knowledge. "We create as much information in two days now as we did from the dawn of man through 2003," said Google CEO Eric Schmidt.⁴ But the waves of information that are unleashed by social media come at a price; they can overwhelm users and recipients. And an overwhelmed user is an unwilling user—not a good thing for the most capable system.

The solution: don't just maximize connectivity; put your energy into making every connection count. Like a child with too many toys, a user with too many digital tools may find himself staring glassily into space—or screaming in frustration.

Obviously, every business is different, and the way you choose to cook and serve your knowledge will depend on your company's specific needs. The following short narratives illustrate how some very different organizations tailored knowledge transfer with social media to their own situations, maximizing personal and business connections without overwhelming employees—the right amount of meat, cooked quickly and efficiently to a variety of tastes.

A note on the law as it relates to social media in the workplace: Yes, your employer can do that. The Federal Electronic Communications Privacy Act (ECPA) allows it. If your office uses an electronic mail system, the employer owns it and the server on which it resides, and is allowed to review its contents, including web-based personal email accounts and voicemail systems. In other words, unless you are explicitly told otherwise, assume that you are being monitored.⁵

2 Andrew McAfee, "The Case against the Business Case," Andrew McAfee's blog, *The Business Impact of IT*, July 28, 2006, http://andrewmcafee.org/2006/07/the_case_against_the_business_case/

3 For a more thorough introduction to the tools and techniques of knowledge transfer, see Kent Greenes and Diane Piktialis, *Bridging the Gaps: How to Transfer Knowledge in Today's Multigenerational Workplace*, The Conference Board, Research Report 1174, 2008, available at www.conferenceboard.org

4 MG Siegler, "Eric Schmidt: Every 2 Days We Create as Much Information as We Did up to 2003," *TechCrunch*, August 4, 2010, <http://techcrunch.com/2010/08/04/schmidt-data/>

5 "Fact Sheet: Workplace Privacy and Employee Monitoring," *Privacy Rights Clearinghouse*, revised January 2011, <http://www.privacyrights.org/fs/fs7-work.htm>

Table 1 **Matching the Medium to the Message: Social Media Tools and How to Use Them**

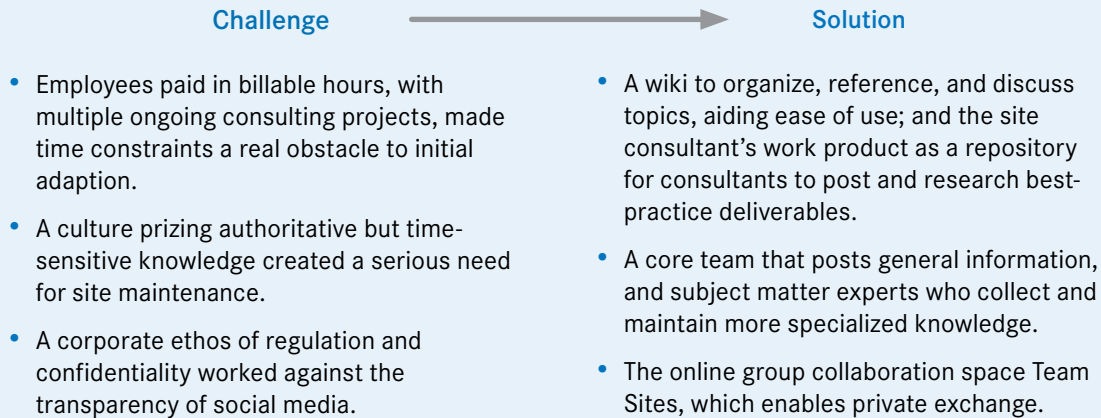
Social media tool	Social networking sites	Wikis	Blogs	Microblogs	Virtual environments
Uses	Find and connect with people who have relevant knowledge or who are thinking about similar ideas	Find relevant knowledge	Find relevant knowledge	Search for just-in-time knowledge and share it quickly	Share and transfer knowledge with distant colleagues
	Quickly find experts	Document and share your own knowledge or ideas, and generate feedback	Document and share your own knowledge or ideas, and generate feedback	Scan others' posts to fuel your ideas	Collaboratively work through complex problems that require visuals and clarity
	Expand your professional network	Float a "trial balloon" idea and get feedback on it	Express an idea that is not yet fully formed	Follow progress of your team members on a project, streaming requests for help or new insights	Post a "trial balloon" idea and collectively shape it
	Post profiles of team members on sites that are behind your firewall	Document and store vetted knowledge for reuse	Scan others' blogs to fuel your ideas		
		Collaborate on tasks and projects on sites behind your firewall	Post questions and responses before and after an event or task, or between meetings		
		Post and store content in one place (more efficient than mass emails)			
Applications	Accelerate your learning in a new job or practice area	Accelerate your learning in a new job or practice area	Accelerate your learning in a new job or practice area	In real time, share something you've just learned; e.g., while you or others are on a sales call	Hold forums, "share fairs," and other exchanges when time, cost, and distance prohibit face-to-face meetings; train colleagues more interactively
	Locate and leverage experts outside your personal network	If approaching retirement, make your knowledge available to the next generation	If approaching retirement, make your knowledge available to the next generation	Problem solve and get answers	Generate solutions to complex problems; engage younger workers in the interactive, non-linear way they prefer
	Get to know new people in your practice area, and be known to them	Business innovations, e.g., first-time problems such as entering a new market or creating a new product	Find solutions to first-time problems such as entering a new market or creating a new product	Get just-in-time knowledge to the people who need it when they need it; speed up status updates	Collaborate on solutions to first-time problems such as entering a new market or creating a new product
	Accelerate team building and improve alignment of people to tasks in your own company	Minimize "reinvention of the wheel" when: <ul style="list-style-type: none"> working with repeatable processes and procedures; and when working across geographies and time zones 	Use to disseminate and elicit authoritative information on a website viewed by the audience you want to reach		
		Accelerate development of products and increase efficiency	Get participants involved and in sync early, and facilitate adaptations when things don't go according to plan		

Overcoming Obstacles at Buck Consultants

Buck Consultants, a Xerox company, is a global HR consulting firm that employs more than 1,500 people.

BuckNet, the company's intranet (created with the Microsoft SharePoint application), shares information ranging from the employee phone directory to the most recent legislation on actuarial training topics. BuckNet is not dramatically different from other knowledge databases, but does offer a unique repository for the knowledge that differentiates Buck Consultants from its competitors.

During the establishment of BuckNet, the company's specific challenges called for innovative solutions:



A few Buck tips:

- 1 When setting up a digital knowledge transfer system, convey urgency and a clear sense of benefits.
- 2 Make sure you can answer the question "What's in it for me?" when employees ask.
- 3 If your information tends toward the technical, make your site visually interesting and avoid text-heavy gray space as much as possible.
- 4 Make work websites as fast and friendly as the digital tools employees are accustomed to using at home.

Source: Material from interviews with Buck Consultants employees and Research Working Group members.

Setting Up Guidelines at NCCI

The National Council on Compensation Insurance, Inc. (NCCI) manages the nation's largest database of workers' compensation insurance information and employs almost 1,000 people.

Two business initiatives converged at NCCI in 2009: the IT division began examining newer social networking technologies, while other departments identified a need to handle complex, intuitive knowledge better. As leaders became educated on the possibilities of what new social technology could do, they realized that digital communication tools were particularly suited to connections and collaboration – the same capabilities needed to manage complex knowledge.

NCCI established a “collaborative tools” team that included representatives from IT, communications, legal, and HR. As they developed rules for governing the new media, they considered the following issues:

- Whether to use the term “policy” or “guidelines” with reference to social media rules. Given the fluid nature and shifting landscape of social networking, the team decided that use of the looser “guidelines” was more appropriate than the stricter “policies.”
- Whether to require employees to comply with the guidelines for work as well as in their personal lives. Given that at NCCI individual employees' actions could have a negative impact on fellow employees, work responsibilities, or NCCI's business interests, the team decided to apply the guidelines to accessing both online corporate communication systems and employees' own personal electronic communication systems, such as home computers and smartphones.

- Whether employee activity should be monitored both internally and externally. The team incorporated the following into the guidelines: NCCI reserves the right to monitor employee activity on all forms of social networking. Employee activity is not directly monitored, but infractions brought to the attention of management will be dealt with. NCCI may request that an employee cease inappropriate commentary or remove a posting, and may take appropriate disciplinary action. Non-compliance moves the issue from a breached guideline to the appropriate code of business conduct policy.
- Whether managers should be held to a higher standard than employees. The team established this guideline: employees should operate in accordance with their role, and more is expected of managers or experts who may be known in the industry and whose personal thoughts may be misunderstood as expressing NCCI positions or making commitments on behalf of NCCI, especially if their comments can be traced.^a

A few NCCI tips:

- 1 Look at social media as a way of life and not a project.
- 2 Create a robust communication plan that addresses culture change to get employees beyond an “It's just Facebook” response. NCCI adopted the theme “Get connected” to introduce social networking tools.
- 3 To be taken seriously, emphasize business benefits and use business terminology, e.g., “collaborative tools” versus “social media.”

a For many other examples of company governance policies go to <http://socialmediagovernance.com/policies.php>

Source: Material from interviews and presentations by NCCI employees and Research Working Group members.

Common Knowledge Transfer Methods

Virtual meetings are held on the internet or intranet. Participants typically use audio through a telephone or voice-over-internet protocol (VOIP) connection in conjunction with a website that provides document sharing and supports interaction between host and attendees. A video connection can be used to augment participation.

Discussion forums are electronic message boards, i.e., web applications that enable threaded, asynchronous discussions. A user creates a topic in the form of a question or comment, and responses are threaded below the originating topic; participants respond wherever they are, whenever they choose.

Mentoring is a reciprocal relationship between an advanced career incumbent (mentor) and a novice (mentee), typically aimed at promoting the development of the mentee. Mentoring facilitates knowledge transfer between people from different but related backgrounds, generations, or departments.^a Reverse mentoring, a relatively new practice, is being used more and more to transfer knowledge from younger mentors to older mentees.

Communities of practice (CoPs) are voluntary groups of peers, practitioners, and other individuals whose members regularly engage in sharing knowledge based on common interests. The leader and members establish a charter and collectively decide which procedures work best for them. Sometimes called knowledge communities, CoPs often become custodians of competence in a particular practice, codifying their collective know-how in a form that can be reused and adapted by other practitioners.

Group learning techniques are methods and practices used by teams to explicitly learn before, during, and after work tasks and projects. In their most basic form, they are facilitated meetings that use inquiry and reflection to elicit insights from participants. Some common group learning techniques used:

- Peer assist (aids learning before doing) is a facilitated meeting or workshop where peers from different teams share knowledge with a team that has requested help.

The assist targets a specific technical, mission, or business challenge that requires assistance from people outside the team. It develops strong, and often new, connections among participants, and it works because people are more open to knowledge and insights from their peers before they undertake a project or challenge. Key to success: convene the session after a team has exhausted its internal knowledge and created its plan, but before the start of actual implementation.

- Action review (aids learning while doing) is a quick and simple team-learning process held while work is being performed, usually during a break. It helps teams learn in the moment and transfer knowledge immediately to the work at hand. It was originally designed by the U.S. Army and is based around four simple questions:
 - 1 What was supposed to happen?
 - 2 What actually happened?
 - 3 Why were there differences?
 - 4 What can we learn and do differently right now?
- Retrospect (aids learning after doing) captures a team's knowledge after completion of work. Retrospects combine reflection from each team member into group advice, often creating new knowledge in the process, and enhancing team cooperation and sense of closure.
- Baton passing moves knowledge by identifying high-impact lessons and securing commitment to action. It involves three players: a knowledge source who is leaving a position or role, a knowledge receiver who is taking up that position or role, and a facilitator.^b

a *Bridging the Gaps*, The Conference Board, 2008, pp. 47-49.

b Baton passing was developed at Pfizer by Victor Newman, chief knowledge officer, in 1999.

What to Keep in Mind: Knowledge Transfer Concepts and Practices

Sharing simple knowledge with people you know is one thing; sharing complex knowledge with unidentified recipients is a different matter entirely. This is where knowledge transfer tools and concepts come in.

A few principles:

- In its most basic form, knowledge transfer involves learning from experience, assimilating that learning into what we already know, and transferring this to others.
- Knowledge transfer requires understanding the limits of language; much of what we know is tacit and implicit, and requires elicitation – somebody has to target this knowledge to get it.
- Understanding how your knowledge recipients are hearing you is key. You have to get a lot right: delivery, resonance, credibility, and persuasion.
- It helps to discern the information you elicit into five types of knowledge: systemic, conditional, procedural, declarative, and social.
- It's important to align the method or media with the knowledge transfer goal. For example, a checklist works for transferring procedural knowledge, while a video on YouTube is effective for sharing a story about building a relationship with a customer.
- To harvest knowledge, you need to understand working memory. The human brain is only capable of retaining approximately five things before it needs to commit some knowledge to at least temporary storage. Harvesting and organizing knowledge in “chunks” addresses this issue.
- Knowledge doesn't exist in a vacuum. Both the sources and receivers of knowledge need to help each other to contextualize and describe what they know and what they need to know.



About the Authors

Kent A. Greenes, who serves as program director for The Conference Board Learning and Knowledge Management Council, is an internationally recognized expert on knowledge management. His recent clients include Save the Children, the U.S. Army, NASA, Northrop Grumman, and the Defense Intelligence Agency. Prior to starting his own consulting firm, Greenes worked as chief knowledge officer at SAIC, whose clients included Unocal, Frito Lay, and NORTHCOM. Prior to that, he worked for 17 years at British Petroleum, where he started as a geophysicist and eventually became head of knowledge management. He initiated and directed BP's global Virtual Teamwork Program. Greenes is executive in residence at George Washington University; a faculty member at California State University at Northridge; and on the advisory board of several companies and organizations, among them Tomoye, KMPro, and the U.S. Army Battle Command Knowledge System.

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