

LOTUS AND IBM KNOWLEDGE MANAGEMENT PRODUCTS

An Introduction to Lotus and IBM Technologies



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This white paper highlights the benefits of Knowledge Management and provides a detailed overview of Lotus solutions currently available, as well as those in development. It also introduces Lotus K-station and Lotus Discovery Server — new solutions that bring sophisticated Knowledge Management capabilities.

Meeting the Challenges of Today's Marketplace

Organizations in the Internet era are facing a highly competitive landscape where dot.com startups can take market share from the biggest multinationals. The need to move faster, think smarter, and maximize all of your assets (human and informational) is stronger than ever. Across all organizations and industry, effective Knowledge Management (KM) is emerging as a crucial element of success.

A wealth of knowledge exists within the walls of every organization — from the minds of employees to back-office databases to time-tested policies and procedures. Successful companies recapture and reapply that knowledge in ways that solve new business problems, leveraging the overwhelming strategic advantage that lies in “knowing what you know.”

An Industry-leading Commitment to Knowledge Management

Lotus® and IBM® Research and the IBM Institute for Knowledge Management (IKM) are dedicated to the observation and analysis of successful Knowledge Management practices. These efforts have generated compelling insights into the technological and social foundations of business interaction. Together with over 20,000 customer engagements of IBM Global Services Knowledge Management Practice and Lotus Professional Services, they have also helped Lotus and IBM define the practice and purpose of Knowledge Management as it relates to real-world business activities. This insight has shaped the development of products and services that are available today to solve specific business problems.

Knowledge Management is far more than technology for locating or managing the “right” information. To drive competitive advantage, KM solutions must also help organizations create new knowledge, and decisively apply those insights to achieve concrete business goals — processes that entail collaboration among people.

A Focus on People, Places, and Things

In short, *people*, not facts, are the focal point of Knowledge Management. To create and act on knowledge, people need *places* to meet and a way to manage the *things* (data, information, processes) that they find or create.

People, Places, and Things are the key elements that form the basis for the development of Knowledge Management technology. Lotus and IBM have created KM products and services that provide these capabilities. We have also created a unifying platform that integrates them. And, in conjunction with our Business Partners, we are working to create a wide range of solutions that deliver the tremendous value of KM to the end user and to the customer.

This paper provides an overview of our currently available and soon-to-be-released Knowledge Management products.

The Business Value of Knowledge Management

In the marketplace of e-business, both traditional and nontraditional companies face similar challenges:

- To improve the flow of information and knowledge across operating units
- To improve competitive response or identify new opportunities faster
- To reduce operating costs, or to operate more efficiently as a global organization
- To accelerate the rate of innovation and/or reduce cycle times
- To reduce the loss of intellectual assets due to employee turnover
- To improve customer retention

For many organizations, Knowledge Management initiatives begin with the need to address these kinds of challenges: to get a handle on expertise; to stop reinventing the wheel; to better leverage a multinational engineering staff; to improve customer care or capture customer information more effectively; and to repeat “best practices.” Many Lotus and IBM customers, for instance, want to extract knowledge from their supply chains and push value-added knowledge back into the demand chain as a means to build and improve customer loyalty.

Through our experience with customers in implementing KM solutions, Lotus and IBM have come to view Knowledge Management in terms of the strategic business goals it can most effectively support. We see KM as a discipline to systematically leverage information and expertise to improve organizational responsiveness, innovation, competency and efficiency (RICE); see Figure 1.

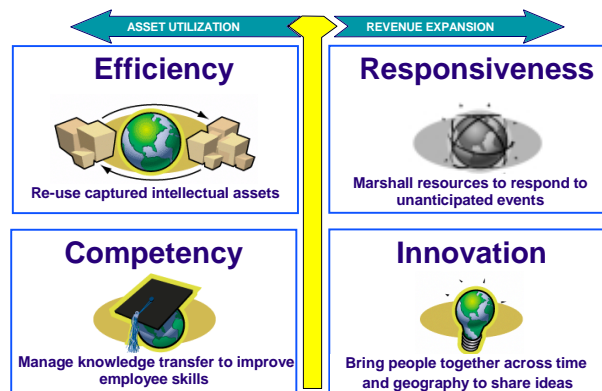


Figure 1: Business goals supported by Knowledge Management

As Figure 1 illustrates:

- Responsiveness refers to the ability to rapidly respond to change.
- Innovation is the successful fostering of an organization’s creative capacity.
- Competency is the ability to catalog the knowledge and expertise held by current employees and make it available to others, especially new employees.

- Efficiency concerns the capacity to “know what we know” in order to minimize the effort wasted in reinvention of the wheel.

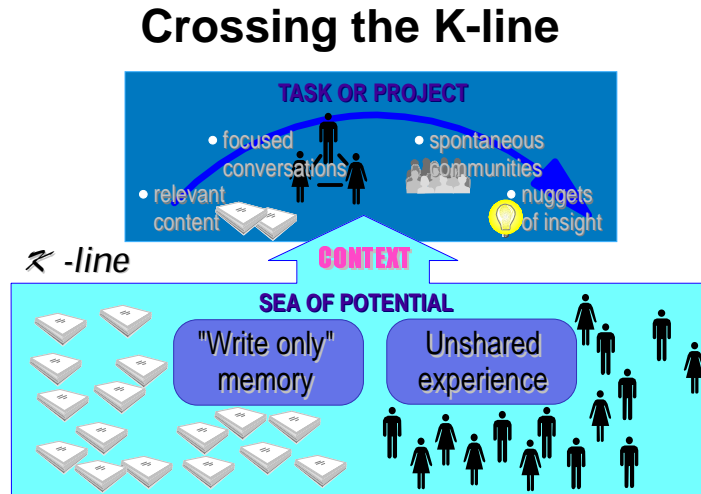
Enhanced responsiveness and greater innovative capacity drive the top line by expanding revenue. Efficiency and competency save money by improving asset utilization. Whatever the application(s) implemented, KM serves to encourage the sharing of knowledge and expertise, support ongoing learning, and reduce intellectual loss through employee turnover and job change.

Crossing the K-Line

Every business swims in a “sea of potential” comprised of two forms of knowledge that are notoriously difficult to utilize:

- Its “write-only memory,” consisting of all the data it has collected and recorded.
- The unshared tacit knowledge and experience carried in the minds of its employees.

“Crossing the K-line” (that is, deploying high-value KM solutions) enables traditional businesses to leverage this sea of potential knowledge more completely, to achieve concrete business goals. The ultimate benefit of KM for traditional businesses is nothing less than the ability to turn the tables on nontraditional competitors by becoming an “enlightened” generator of nuggets of insight — that is, create new knowledge.



The Five Key KM Technologies

For many organizations the ability to find the right document is seen as the single most critical Knowledge Management problem. So the company begins to evaluate products such as document management for the discovery of content. Ostensibly, once this problem is solved, the organization's Knowledge Management problem has been solved!

And indeed, document management can add tremendous value across a wide range of business processes. But consider whether finding the right document really meets the end user's core information need. Might there not be even greater value in knowing who wrote the document? What other expertise that person has? What other documents she has created?

The point is that sometimes you really need the expert, not the document. Knowledge consists of both *content* (data and information) and *context* (a perspective that gives meaning to the content). And a *context-creating relationship* is required to derive a valuable insight from the content. Put another way, the ability to relate content to context yields greater value than the ability to simply discover content.

One way KM forms context-creating relationships is by automating labor-intensive processes such as: clustering similar documents into topics; mapping relationships between topics and employees; and supporting planned and spontaneous communities. These are the kinds of context-creating relationships that can yield knowledge and in the process help make an organization nimble, fast and successful.

The interplay between content and context has important ramifications for KM technology vendors because it illustrates the value of a suite of KM products that supports the full spectrum of content/context relationships. And this is precisely what Lotus has to offer: the added value of integrated KM solutions.

Value Through Interaction

The value of Knowledge Management as embodied in the ability to relate content and context, is maximized by the interaction of certain key technologies. In the course of our work with customers, Lotus and IBM have identified these essential KM technology areas, and developed products to deliver them (see Figure 2):

- **Business Intelligence**, as exemplified by data and text mining, OLAP, and data warehousing.
- **Collaboration**, embodied by groupware products, but also including synchronous messaging (i.e., the telephone) and asynchronous messaging (e-mail) technologies.
- **Knowledge Transfer**, including computer-based training, distributed learning and live classes, seminars and discussions.

- **Knowledge Discovery and Mapping**, including search tools, content classification tools, data navigation capabilities and document management.
- **Expertise Location**, encompassing expert networks, visualization affinity identification and other tools that connect people.



Figure 2: The five key Knowledge Management technologies.

These are the key technologies required to connect People, facilitate their efficient collaboration in a common Place, and support their efforts to share and reuse whatever Things of value they discover and create.

No one of these key technologies is as valuable alone as it can be in relation to others; they build on each other and deliver value in proportion to their level of mutual interaction. Document management is more valuable when its repository is searchable, for instance. A shared online workplace can be utilized more efficiently when it includes built-in expertise location and can be accessed via participants' desktop portals. Moreover, a single product may provide multiple KM technologies. One instance is Lotus Domino™, which supports not only Collaboration but also Knowledge Discovery and Mapping.

Lotus Knowledge Management Products

This section describes the integrated Knowledge Management products and tools available from Lotus and IBM. Each product adds value by delivering one or more of the five KM technology capabilities.

- Lotus K-station™

Lotus K-station is a browser-based collaborative portal, or access point, through which individuals can acquire, share and transfer business knowledge. K-station gives both users and developers the unique ability to rapidly create personalized, Web-accessible team workspaces within the portal. Online awareness and real-time chat capabilities are also available throughout the portal, so you can easily see who's online, connect with them instantly and get answers fast.

- Lotus Discovery Server

The Discovery Server provides expertise profiling and location; sophisticated content cataloging and retrieval; and comprehensive search and knowledge audits. The server crawls through structured and unstructured content in order to extract, organize, and store the data that may be relevant to a given business task. The server also tracks relevant end user activity, identifying those individuals who may be best suited to address the task. The server was designed to be used as a rich back-end service to Lotus K-station or as a stand-alone Knowledge Management solution for any other corporate portal.

- IBM Content Manager

Today you are managing an ever-increasing volume of digital content. IBM Content Manager is a robust cross-platform datastore for all types of content — images, computer output, documents, and rich media — that enables rapid integration of e-content into your core business processes.

- IBM Enterprise Information Portal

The IBM Enterprise Information Portal (EIP) enables the business user to rapidly access, manipulate and deliver content through a rich set of development components and services. Personalize data queries, search for highly specific needs, and utilize relevant results — from across an unrivaled number of IBM and non-IBM data sources.

- IBM Mindspan Solutions

IBM Mindspan Solutions is an innovative family of services and technologies designed to help you make e-learning part of your organization. IBM Mindspan Solutions provide comprehensive, reliable e-learning solutions that generate measurable results. We offer planning and design services, content development, as well as management and support. IBM's experience in designing and delivering effective e-learning solutions is unequalled in the industry.

- Lotus Domino

The Domino Server Family is an integrated messaging and Web application platform that companies use to deliver secure, interactive e-business applications and a rock-solid infrastructure for messaging and collaboration. A cornerstone to any KM initiative, Lotus Domino gives you the foundation for building knowledge and collaboration applications.

- Lotus Domino.Doc™

You need a way to manage the multitude of documents your organization creates and receives. Domino.Doc automates and expedites the collaborative process of creating and using proposals, reports, presentations, white papers, budgets, and more. Domino.Doc facilitates group authoring and editing, document review and approval, managing user access, and archiving. Create a living library that helps your organization discover what you already know.

- Lotus Domino Extended Search™

Domino Extended Search provides parallel, distributed, heterogeneous searching capability across Notes domains, legacy data stores, and the Internet — within the Notes and Domino environment. The result is single-point access to a variety of data stores without incurring the cost of a new, central index or additional storage.

- Lotus Domino Workflow

Develop, refine and manage your business workflow processes. Create workflow applications quickly, then easily update them to match your changing organizational needs—all with a visual, point-and-click interface. Monitor business processes throughout your organization to ensure knowledge is distributed and actions are initiated.

- Lotus LearningSpace®

LearningSpace 4.0 is the complete learning management and delivery system that lets you seamlessly integrate your course content, whether you create it yourself or purchase it from leading providers. You can mix and match delivery methods in a single course — including self-directed, asynchronous, or real-time collaboration. When you choose LearningSpace 4.0 you get a comprehensive software platform that lets you create, manage, and deliver e-learning that changes the way your business learns and works.

- Lotus Notes® R5

Notes™ R5 is a powerful Internet messaging and collaboration client that includes full standards support. Customizable and lightweight, Notes R5 gives you the power to work the way you want, anywhere you want. Notes R5 delivers new and unprecedented search and navigation capabilities that help you quickly and easily find what you're looking for and adapt it to your needs. Your e-mail, calendar, Web links, discussions, and teamrooms are at your fingertips on one screen through an easy-to-use, customizable interface.

- Lotus Records Manager

As companies become more dependent upon electronic — instead of paper-records, and documents are now signed electronically, companies today are moving away from paper-based storage, and taking advantage of all the functionality and benefits of electronic records management. The only unified solution on the market today, Lotus Records Manager provides effective lifecycle management of e-records.

- Lotus QuickPlace™

Point, click, collaborate. QuickPlace is a self service Web tool that enables the creation of an online team workspace — instantly! Structured for participation and productivity, teams utilize QuickPlace to centrally communicate and organize ideas, content, people and tasks around any project or ad-hoc initiative. Browser-based, no special training or client software installation is required. Meet your deadlines, meet your objectives, meet in QuickPlace.

- Lotus Sametime®

A stand-alone, real-time collaboration software solution that makes it easy for you to find coworkers, partners, customers and suppliers online — and communicate with them regardless of where they're located. With one click of the mouse you can move from instant messaging to an online meeting where you can share live documents and applications. Sametime provides a comprehensive application development platform for creating real-time enabled business applications, allowing users to work more efficiently and effectively.

Toward a Unified KM Platform

Two key solutions bring sophisticated new capabilities to our integrated collection of Knowledge Management technologies:

- **Lotus K-station.** A knowledge portal that organizes content, applications, and people for both individuals (Personal Places) and communities (Community Places).
- **Lotus Discovery Server.** A sophisticated solution that probes an organization’s combined knowledge and discovers the relationships between People, Places, and Things so that they can be applied to specific business challenges.

As key elements of the overall Lotus and IBM Knowledge Management strategy, these solutions are the technological manifestation of the business methodologies framed by the “People, Places, & Things” concept.

K-station provides a collaborative portal, or single point of entry, through which end-users and communities can conduct their business tasks. This solution enables end-users to organize their work by community, interest, task, or job focus, and provides powerful out-of-the-box capabilities for team collaboration.

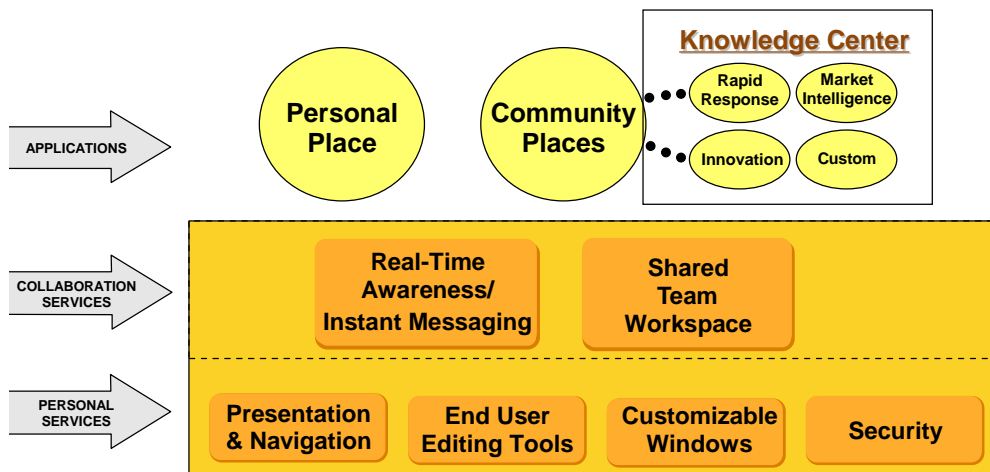


Figure 3: The K-station portal architecture.

Components of the K-station Portal Architecture

- *Personal Services.* Enables self-service organization of content by users. Utilizes DHTML to support dynamic customization. Security features provide privacy for personal and shared places.
- *Collaboration Services.* K-station has been integrated with collaborative tools for people awareness, instant messaging, and creating shared community places with useful teaming tools and content.
- *Applications.* Personal and Collaboration Services are delivered to end users through these two applications:
 - *Personal Places.* Unique to each user, these multi-page places feature customizable portlets or windows into users' Web sites, applications, back-end systems, search tools, news sources, mail, calendar, and other portals. Personal Places are linked to Community Places, that is, other communities that include the user (see Figure 4).
 - *Community Places.* A key differentiation from other portal solutions, Community Places represent "reusable knowledge objects" that retain relationships among people, content, activities, and processes relative to a specific task or project. Discussions, presentations, documents, plans, and schedules represent "reusable knowledge objects" that are important byproducts of a common effort. Community Places can be easily created and organized by team members, optionally leveraging the Place Type templates included in the design environment.

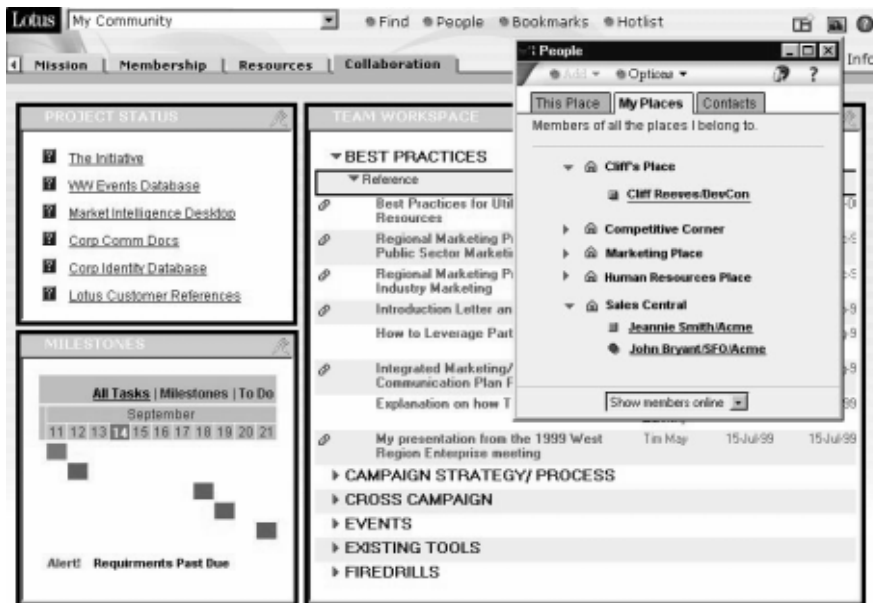


Figure 4: Here we see what a user's Community Place might look like. The user can access a TeamRoom®, view project status, link to other corporate resources, and see who else is online and available to be contacted both in this Community Place and others where the user is a member.

The Lotus Discovery Server

The Lotus Discovery Server provides sophisticated discovery tools that categorize content and an organization's expertise into browsable and searchable catalogs. The Lotus Discovery Server locates and organizes the relevant content and expertise required to address specific business tasks and projects. To do this, the discovery server analyzes the relationships between content, people, topics, and activity. The knowledge and expertise it discovers can then be accessed, shared, and exchanged.

The Discovery Server provides expertise profiling and location; sophisticated content cataloging and retrieval; and comprehensive search and knowledge audits. The server crawls through structured and unstructured content in order to extract, organize, and store the data that may be relevant to a given business task. The server also tracks relevant end user activity, identifying those individuals who may be best suited to address the task.

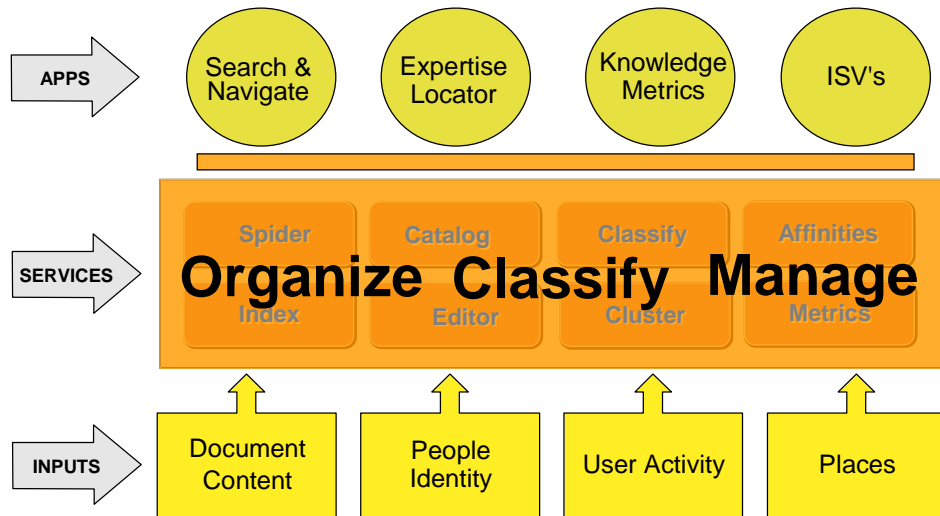


Figure 5: The Lotus Discovery Server Architecture.

The Lotus Discovery Server and K-station

The Lotus Discovery Server is not required when using K-station. Both K-station and the discovery server have been designed to operate as stand-alone products or as an integrated solution, depending on the needs of an organization. However, the two solutions combine to offer an even more powerful set of Knowledge Management capabilities. For example:

- The **Knowledge Map** (KMap), generated by the Lotus Discovery Server, can be searched directly from the Find button on K-station's Action Bar, the context menu on the people collaboration menu pop-up, or from the KMap search portlets.
- When a person's name appears in K-station, users can view the associated profile generated by the discovery server.
- **Hotlists** — dynamically updated, personalized, to-do lists generated by the discovery server — can be managed from within K-station.
- **Shared Community Places** within K-station are recognized, indexed, and searched by the Lotus Discovery Server — preserving the context between the people, content, and objectives of the Place.
- **Place-based awareness** is shared across K-station and the Lotus Discovery Server.

Because of the high level of Lotus and IBM product integration, applications deployed using Lotus and IBM products can be integrated with Lotus K-station and Lotus Discovery Server.

Applications, Solutions, and Services

Together, Lotus and IBM provide the applications, solutions, and services that enable you to make Knowledge Management a reality within your organization. Our comprehensive approach ensures that you get a complete, end-to-end Knowledge Management solution — one that continues to grow with your organization.

All of the Elements Necessary for Successful KM Environments

The full range of Lotus and IBM KM solutions offer you a robust, flexible platform for KM — one that lets you meet your specific needs. And the introduction of Lotus K-station and Lotus Discovery Server brings powerful new capabilities to Knowledge Management — all while ensuring seamless compatibility with our existing applications and solutions.

While our products provide the rock-solid foundation for KM, we recognize the important role that services play in establishing any successful, long-term KM solution. We offer an unequaled array of services from Lotus Professional Services (LPS), IBM Global Services (IGS), the IBM Advanced Business Institute, our KM Partnering for Growth Program, and other groups.

Lotus Professional Services (LPS)

Lotus Professional Services (www.lotus.com/services) brings together consulting, education, and support services to help you maximize the benefits of their investments in Lotus technologies. LPS has helped countless companies worldwide to articulate their visions and map appropriate technology solutions. LPS brings years of applied experience in virtually every industry and size of company to bear on technology implementations that meet these core business challenges: capturing and preserving internal knowledge, boosting productivity, improving customer service, enhancing customer loyalty, increasing sales, and sharpening competitive positioning.

LPS has five KM service offerings that enable your organization to identify high-value KM solution opportunities, then build a business case for the pilot and ultimate delivery of a knowledge-based initiative. These service offerings build on one another and leverage the strategic investments made in a Lotus Notes/Domino infrastructure. Offerings include:

- **Knowledge Management Vision Workshop Series**

The KM Vision Workshop Series helps you discover the value, and potential issues, associated with Knowledge Management in your organization or community. It helps you establish a high-level KM roadmap for undertaking strategic knowledge management initiatives.

- **Knowledge Management Case for Action**

The KM Case for Action offering provides you with a business case (“Case for Action”) for the creation and implementation of knowledge applications. LPS helps you identify the key knowledge application(s) that are likely to have a major business impact. The Case for Action also identifies or validates the drivers of business performance and the processes which are important in supporting your organization in following the strategy. It maps the knowledge domain, evaluates market conditions, assesses the technical environment, develops a high-level solution design, then builds the actual business case.

- **Knowledge Management Solution Architecture**

The KM Solution Architecture provides you with a set of standards, guidelines, and processes that help you establish an incremental, scalable approach to Knowledge Management. In this way, your enterprise can gain short-term benefits from multiple independent knowledge management initiatives. The architecture serves as a “blueprint” for your company to move forward to the end objective of an integrated suite of knowledge management applications that store and manage the “intellectual capital” of the organization.

- **Knowledge Management Solution Design, Development, and Pilot**

The KM Solution Design, Development, and Pilot offering delivers an effective design, development, and pilot program for a high-value knowledge solution within a subset of your organization. After obtaining feedback from the pilot solution, LPS helps conduct large-scale deployment of the solution.

- **Knowledge Management Solution Deployment**

The KM Solution Deployment offering helps you effectively deploy a high-value knowledge solution to a larger group — such as your entire organization, the entire community of practice, or all of the constituencies of a knowledge process. Effectively deploying the solution means more than technology. The LPS plan ensures that measures, reward systems, enticements, and other cultural components are executed in parallel.

IBM Global Services

IBM Global Services KM Consulting offers a wide-ranging portfolio of KM services and solutions. These offerings enable organizations to develop knowledge strategies, identify KM opportunities, prioritize business goals, and deliver knowledge-based solutions. IBM Global Services' extensive KM services includes:

- **Institute for Knowledge Management (IKM)**

IBM conducts action research with over 30 member organizations aimed at advancing the discipline of knowledge management.

- **Knowledge Strategy**

IBM helps plan for KM: put people first, build for scale, mix physical and virtual, tell stories to convey knowledge, and stay on target (winning).

- **Community-Based Services**

IBM helps develop physical and virtual communities for problem-solving, knowledge exchange, and knowledge creation.

- **Community Knowledge Portal**

IBM helps organizations improve the productivity of knowledge workers by providing one-stop, integrated access to enterprise information.

- **Human Capital Management**

Knowledge is power; power is in the people. IBM helps you get a grip on a new way of business.

- **Intellectual Capital Management**

This key offering enables you to build a brain trust. IBM helps you identify and retain the best people and ideas.

- **Organizational Network Analysis**

Know what you know. IBM offers the means to measure knowledge flow in an organization — to root out inefficiencies and build decision and innovation networks.

- **Competitive Intelligence**

Understand what the competition will do, and be able to assemble the right people for the right response. IBM offers the methods and tools to size up the rest of the pack.

- **Knowledge Retention in Mergers and Acquisitions**

IBM helps turn perceived value-adds into real knowledge boosters.

- **Knowledge Disclosure: Storytelling**

IBM gets your organization talking, helping you turn tacit knowledge into explicit knowledge through storytelling.

- **Knowledge Management Technical Services**

IBM covers the nuts and bolts of Knowledge Management, ensuring maximum reliability and capabilities.

The wide range of services offered by IBM Global Services enables you to choose the service(s) that best match your needs, turning to additional services as your needs change. For more information, visit www.ibm.com/knowledge/consulting.html.

The IBM Advanced Business Institute

The institute is a high-level resource dedicated to helping Lotus and IBM customers explore current business issues and gain an understanding of how to leverage technology through courses, colleges, and customized events. Special Knowledge Management courses and “colleges” enable you to gain new insights on KM and its applications within your organization. For more information, visit www.ibm.com/abi.

KM Partnering for Growth Program

Our special Partnering for Growth Program taps the power of an extensive network of third-party Business Partners — all dedicated to using Lotus technologies as the basis for their KM solutions. These innovative partners serve as a valuable resource, one that lets you leverage their specific knowledge and extensive experience to meet your specific KM challenges.

Global Alliances

Lotus recognizes the fact that the large global systems integrators and dominant ISVs influence their customers’ decisions on the selection of KM solutions. Lotus is working to extend the relationships with these partners into Knowledge Management, ensuring that you will have access to the most powerful, wide-ranging KM technologies available.

A separate white paper — “Knowledge Management in Action” — introduces you to three real-world scenarios where Knowledge Management makes a real difference.

A Winning Combination for Knowledge Management

At IBM and Lotus, we are uniquely equipped to help you create collaborative environments by mapping out the most appropriate and promising path for Knowledge Management. Our work often includes strategic planning, opportunity analysis, solution design, and implementation and training. The resulting custom KM solutions are designed to impact multiple business processes and deliver optimum ROI. Our unique combination of applications, solutions, and services helps you create a wide range of Knowledge Management solutions, including:

Emergency response management	Mergers and acquisitions
Help Desk	New product development
Best practices management	Graphics/media creation
Broadcast management	Response to RFP
Decision support	Customer Service escalation
IT disaster recovery	Legal portal
Scenario planning	Reuse library
Risk management	Project management

The Time for Knowledge Management Is Now

Profound market changes — such as the emergence of the Web — have forced many organizations to identify new methods for understanding their customers, competitors, and markets. Knowledge Management is a powerful solution that is now globally recognized as an answer to the challenges posed by the Internet era.

Through our extensive Knowledge Management product offerings, Lotus and IBM enable organizations to access and cultivate knowledge — whether it consists of explicit data or implicit insights. When this knowledge is applied appropriately, it can enhance your responsiveness, innovation, competency, and efficiency. In short, Knowledge Management delivers real business value across an almost unlimited range of business processes.

Knowledge Management adds value by enhancing the connections among *People*, *Places*, and *Things*. **People** have the experience and expertise that every organization depends on. **Places**, whether physical or virtual, provide a workspace that fosters collaboration and knowledge sharing. **Things** are the knowledge elements that people share, including data, information, and processes. By dynamically connecting the people, places, and things within your organization, Knowledge Management enhances your ability to work more efficiently.

Bringing You a Complete KM Solution

The IBM and Lotus Knowledge Management strategy is built around core products that deliver key KM technologies, a Knowledge Management platform that ties these products together, and applications and templates that deliver the power of Knowledge Management to the end user. By providing a complete array of Knowledge Management applications, solutions, and services, Lotus and IBM have embarked on a new stage in computing, one that will help organizations leverage their inherent knowledge and succeed in a new era.

Among the many companies attempting to position their offerings in today's KM marketplace, Lotus and IBM are the clear leaders. Our products and services are the most comprehensive and mature. In addition, we offer thought leadership, dedicated research and development, proven consulting services and cutting-edge executive education.

To learn more about Knowledge Management solutions from Lotus and IBM, visit www.lotus.com/km and www.ibm.com/knowledge.



e-business