

# LDS Case Study

Tracey Angove  
Jason Bargent  
Shawn Callahan

# Agenda

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- Background
- KM Initiatives and communities
- LDS and how it was implemented
- Creating a K-map
- Results



# Large Petroleum Company

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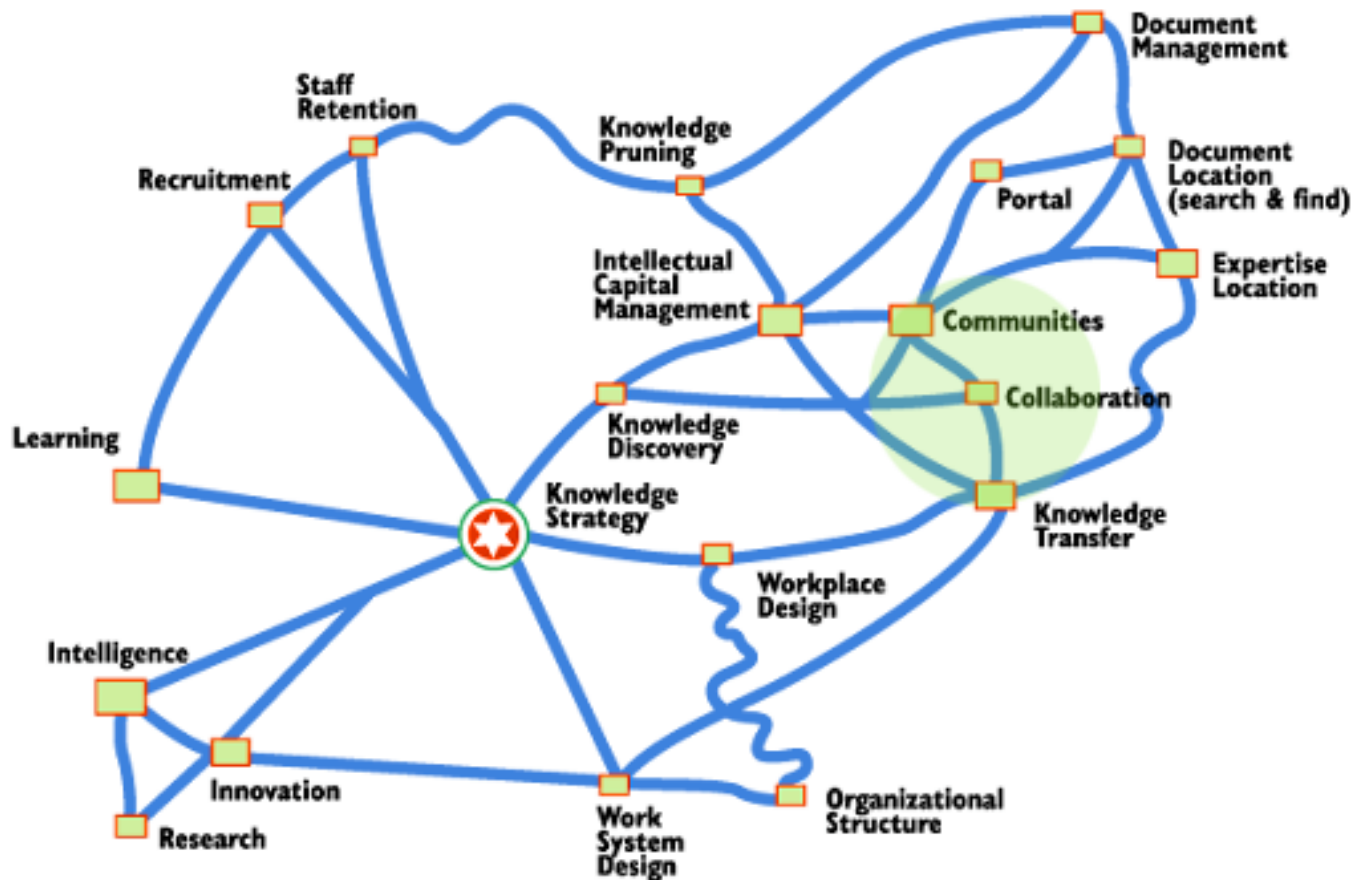
- Key Business Issues driving KM
  - ▶ Increase share price
  - ▶ Greater focus on knowledge based activities (eg. exploration)
  - ▶ Large proportion of the workforce closing on retirement
  - ▶ Transforming into a global corporation

## Enhancing Knowledge Environments

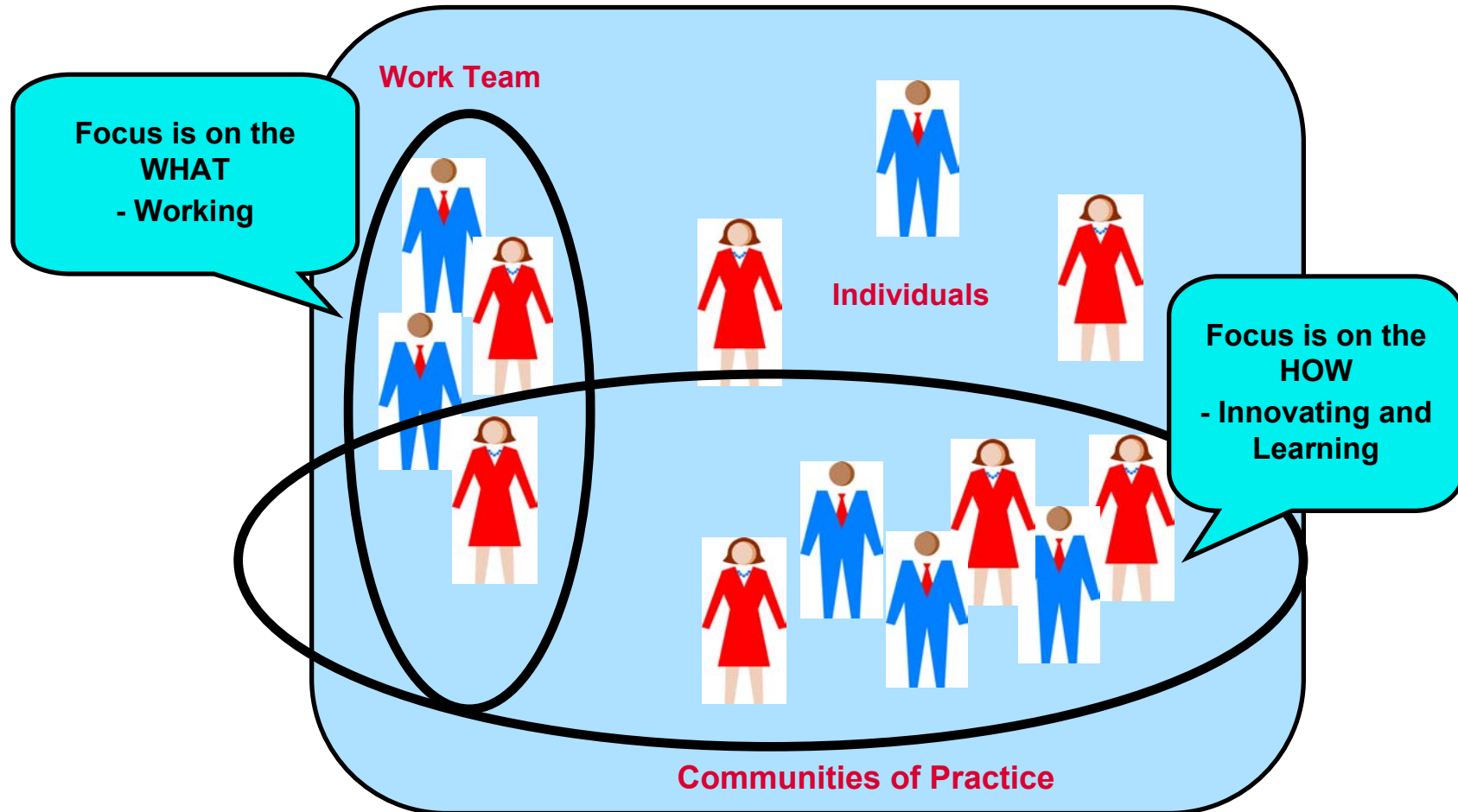
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- People - their attitudes, behaviour and skills
- Culture - values, beliefs - 'how we do things here'
- Processes
- Technology
- Roles and responsibilities
- Strategic direction
- Workplace design
- Incentives and sanctions
- Content
- Organisational structure
- Leadership

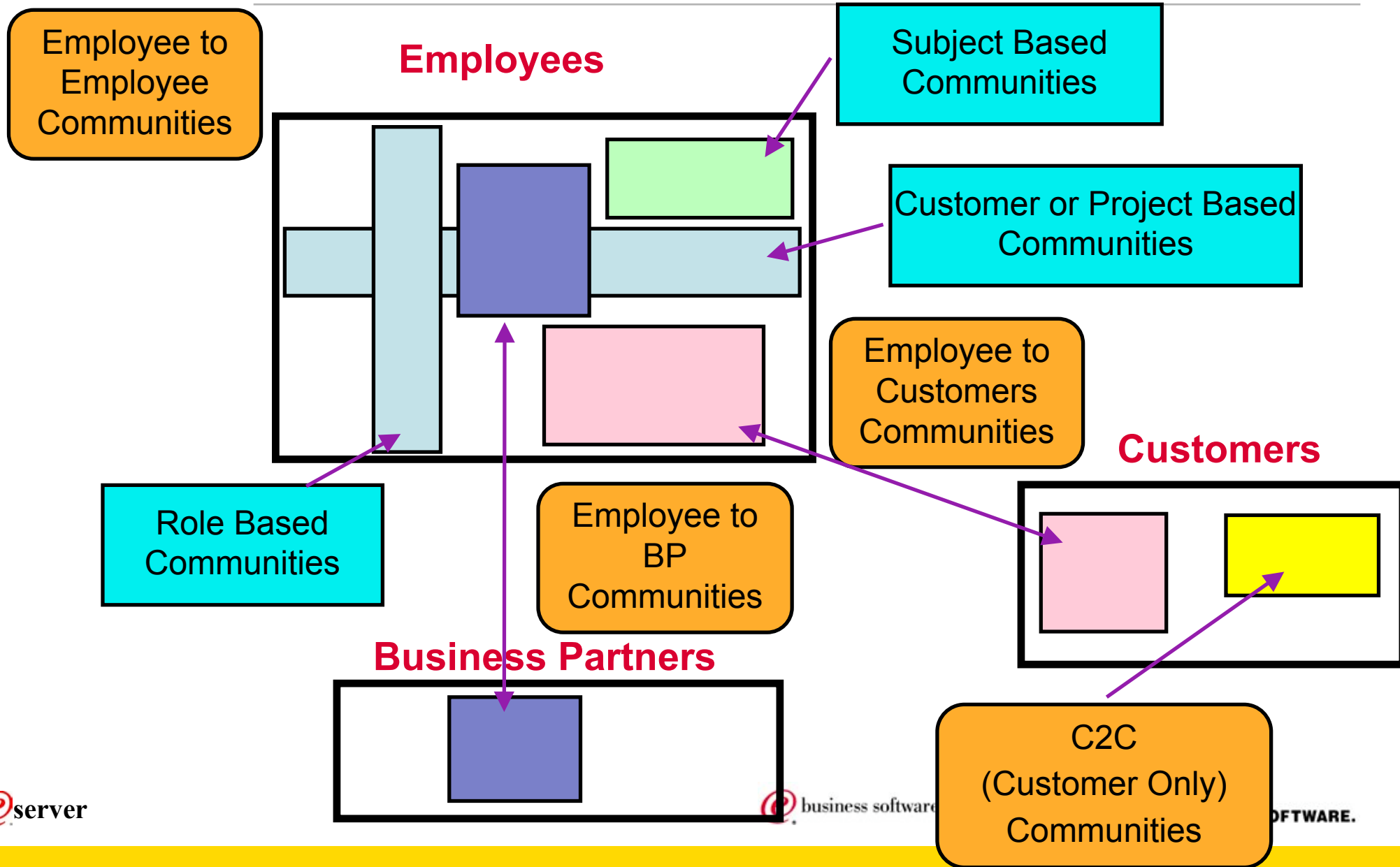
# Tangible KM Initiatives



# Work Teams and Communities



# Types of Communities



# Community Roles

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- Subject Matter Expert (SME)
- Core team member
- Community member
- Leader
- Sponsor
- Facilitator
- Content coordinator
- Journalist
- Mentor
- Administrator/events coordinator
- Technologist



# Identifying and Establishing

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- Map core knowledge needs
- Observe, interview and let practices emerge
- Process for sponsored knowledge networks
- Ability for anyone to create a collaborative space
- Members define what their community is about
- Convene joint activities to build relationships, trust, common language, common stories and personal identities

# Nurturing

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- Support them adequately
  - ▶ Sponsoring board of senior managers who give legitimacy to communities and keep them in the loop
  - ▶ Recognition of community participation in performance evaluation and promotions
  - ▶ Removing barriers
  - ▶ Budgets to cover time, travel, teleconferences etc
- But light-handedly
  - ▶ Too much support becomes a distraction
- Involve them intensely
  - ▶ Connect the communities to critical functions of the business
- But judiciously
  - ▶ Don't distract communities with direct line accountability

# How we assisted in enhancing their knowledge environment using Lotus Discovery Server (LDS)

# What is Lotus Discovery Server

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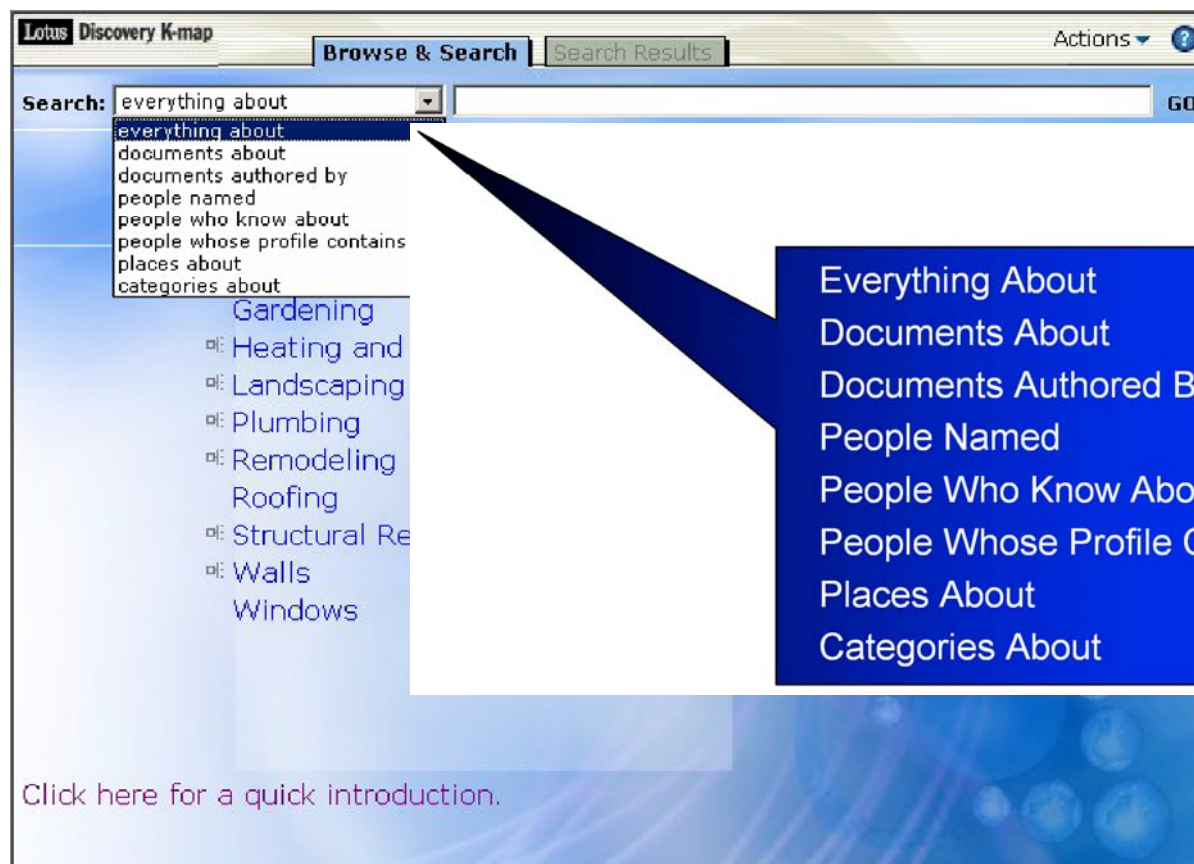
- integrated
- browser user interface
- collaboration
- expertise location
- people awareness
- instant communication
- search
- relevance ranking
- document discovery and
- information categorisation

# Search for Anything or Anyone

The screenshot displays a multi-windowed Lotus software environment. At the top, a Microsoft Internet Explorer browser window shows the United States Patent and Trademark Office (USPTO) website. Below it, a 'Products' window shows a file explorer with folders like 'DevCon2001', 'GDP', 'MECS', and 'IBM'. In the foreground, a 'Sales Tools 5' window is open, displaying a database table for 'SALES' with columns for 'SALES\_DATE', 'SALES\_PERSON', 'REGION', and 'SALES'. The table contains data for various sales dates and regions like Ontario and Quebec. Other windows include a 'Control Center' and a 'Scripted Demo' window.

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# Search for Anything or Anyone



# The Search Results

**Taxonomy**

- Fund Families
- Hedge Funds
- Individual Funds
- News and Quotes
- Small-Cap Investing
- Statistics
- Taxes

**Document Results**

Documents About (8)	Value	Author
Money and Investing	96	Sandy Rose/BOS/Finance
Inside Wall Street	90	James Good/NY/Finance
News: Stock Markets	88	Dale Schuler/DC/Finance
Mutual Fund Cost Calculator	88	Ronald Barstow
Standard & Poor's S&P 500	82	James Good/NY/Finance

**'Experts'**

People Who Know About (5)	Affinity	Job Title
James Good/NY/Finance	100	Senior Journalist
Dale Schuler/DC/Finance	100	Financial Analyst
Mary Richards/NY/Finance	92	Editor
Hugh Smith/NY/Finance	88	Financial Consultant
Kelly Martin/LA/Finance	82	Journalist

**Communities (QuickPlaces)**

- Financial Planning Place
- Mutual Fund Place
- Stock Performance Tracking Place

# Communicate with People you Find

The screenshot shows the Lotus K-map web application interface. The search bar contains 'everything about' and the results are filtered 'within this category'. The breadcrumb trail is 'Home > Finance and Investment > Financial Planning > Investments'. The left sidebar lists subcategories: Fund Families, Hedge Funds, Individual Funds, News and Quotes, Small-Cap Investing, Statistics, and Taxes. The main content area displays three sections: 'Documents About (8)', 'People Who Know About (5)', and 'Places About (3)'. The 'Documents About' section is a table with columns for document title, value, and author. The 'People Who Know About' section is a table with columns for person name, affinity, and job title. The 'Places About' section lists three places related to investments.

Documents About (8)	Value	Author
Money and Investing Diversified funds, market experiments and studies, price quotes and charts.	96	Sandy Rose/BOS/Finance
Inside Wall Street Fact sheets and articles on select growth stock opportunities.	90	James Good/NY/Finance
News: Stock Markets Buy and sell interest indicators on individual stocks, and industry and sector groups.	88	Dale Schuler/DC/Finance
Mutual Fund Cost Calculator Enables investors to estimate and compare the costs of owning mutual funds.	88	Ronald Barstow
Standard & Poor's S&P 500 View stocks tracked in the index, and get snapshot profiles of the associated companies.	82	James Good/NY/Finance

People Who Know About (5)	Affinity	Job Title
James Good/NY/Finance	100	Senior Journalist
Dale Schuler/DC/Finance	100	Financial Analyst
Mary Richards/NY/Finance	92	Editor
Hugh Smith/NY/Finance	88	Legal Consultant
Kelly Martin/LA/Finance	80	Senior Journalist

Places About (3)

- Financial Planning Place
- Mutual Fund Place
- Stock Performance Tracking Place



# Communicate with People you Find

The screenshot shows a Microsoft Internet Explorer window titled "Investments - Microsoft Internet Explorer". On the left, a chat window titled "Carol Easthope [started 10:24]" is open, showing a conversation between Carol Easthope and Beverly DeWitt. The chat messages are:

- Beverly DeWitt: Hey Carol, can you spare a moment?
- Carol Easthope: Sure, how can I help you?
- Beverly DeWitt: I hope you can help; we need to shoot a stunt scene for the new movie Love Notes. I need to move in about 30 crew and their equipment in 3 weeks time, could you organize this for me?
- Carol Easthope: Wow, you don't hang around. But you're in luck, I have a project finishing this Saturday, so yes, could take this on. Will you sort out the paperwork?
- Beverly DeWitt: No problem, thanks, I will email you with the full information tomorrow. Bi 4 now.
- Carol Easthope: Bi

Below the chat window is a text input field "Type your text" and buttons for "Send", "Invite Others...", and "Close".

The main browser window displays "Search Results" for "Investments". It includes a search bar and a "GO" button. Below the search bar, there are two tables of results:

Item	Value	Author
Investment	96	Sandy Rose/BOS/Finance
Investment	90	James Good/NY/Finance
Investment	88	Dale Schuler/DC/Finance
Investment	88	Ronald Barstow
Investment	82	James Good/NY/Finance


Item	Affinity	Job Title
Investment	100	Senior Journalist
Investment	100	Financial Analyst
Investment	92	Editor
Investment	88	Legal Consultant
Investment	80	Senior Journalist

At the bottom of the browser window, there are links for "Financial Planning Place", "Mutual Fund Place", and "Stock Performance Tracking Place".

# View Information on People

**Lotus Discovery** ✎ 📄 ?

**Carol Easthope**



555-9482, [Carol\\_Easthope@fixit.com](mailto:Carol_Easthope@fixit.com)  
 Director of Support, Fix-It Incorporated  
 Cambridge

Affinities (click to open a K-map category):  
[Heating and Ventilation](#); [Handyman](#); [Yards](#); [Sinks and Tubs](#); [Bathrooms](#); (more...)

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<b>Contact Information</b>	<b>Address</b>	10 Main Street Cambridge MA 02142 USA
Affinities	<b>Timezone</b>	Eastern Standard Time
Current Job	<b>Availability</b>	
Background	<b>E-mail Address(es)</b>	<a href="mailto:Carol_Easthope@fixit.com">Carol_Easthope@fixit.com</a>
	<b>Phone Number(s)</b>	555-9482
	<b>Extension(s)</b>	
	<b>Fax Number(s)</b>	555-2098
	<b>Cell Phone Number</b>	
	<b>Pager Number</b>	
	<b>Personal Web Site</b>	
	<b>Office Location</b>	Cambridge
	<b>Office Number</b>	
	<b>Office Mail Stop</b>	

Last Updated: 01/14/2001 09:32 F

# View Information on People

**Lotus Discovery** **Carol Easthope**

555-9482, [Carol\\_Easthope@fixit.com](mailto:Carol_Easthope@fixit.com)  
 Director of Support, Fix-It Incorporated  
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**Contact Information**  
 Contact Information

**Affinities**  
 Affinities are K-map categories about which people have knowledge. Click an affinity below to open K-map and display the corresponding category.

**Current Affinities for Carol Easthope:**  
[Heating and Ventilation](#)  
[Handyman](#)  
[Yards](#)  
[Sinks and Tubs](#)  
[Bathrooms](#)  
[Wallpapering](#)  
[Landscaping](#)  
[Remodeling](#)  
[Walls](#)  
[Paint](#)  
[tub lynn model](#)  
[Chimneys](#)

**Background**  
 Background

Last Update: 01/14/2001  
 Last Updated: 01/14/2001 09:32 F

# View Information on People

**Lotus Discovery** - **Carol Easthope**

555-9482, [Carol\\_Easthope@fixit.com](mailto:Carol_Easthope@fixit.com)  
 Director of Support, Fix-It Incorporated  
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Company	Fix-It Incorporated
Department	Indoor/Outdoor
Job Title	Director of Support
Job Description	
Employee ID	
Projects/Products	
Team Memberships	
Customers Supported	
Professional Training	
Conferences Attended	

Organizational Hierarchy

Organization Name	Organization Code
Level0	
Level1	

Last Updated: 01/14/2001 09:32 F

# View Information on People

**Lotus Discovery** **Carol Easthope**

555-9482, [Carol\\_Easthope@fixit.com](mailto:Carol_Easthope@fixit.com)  
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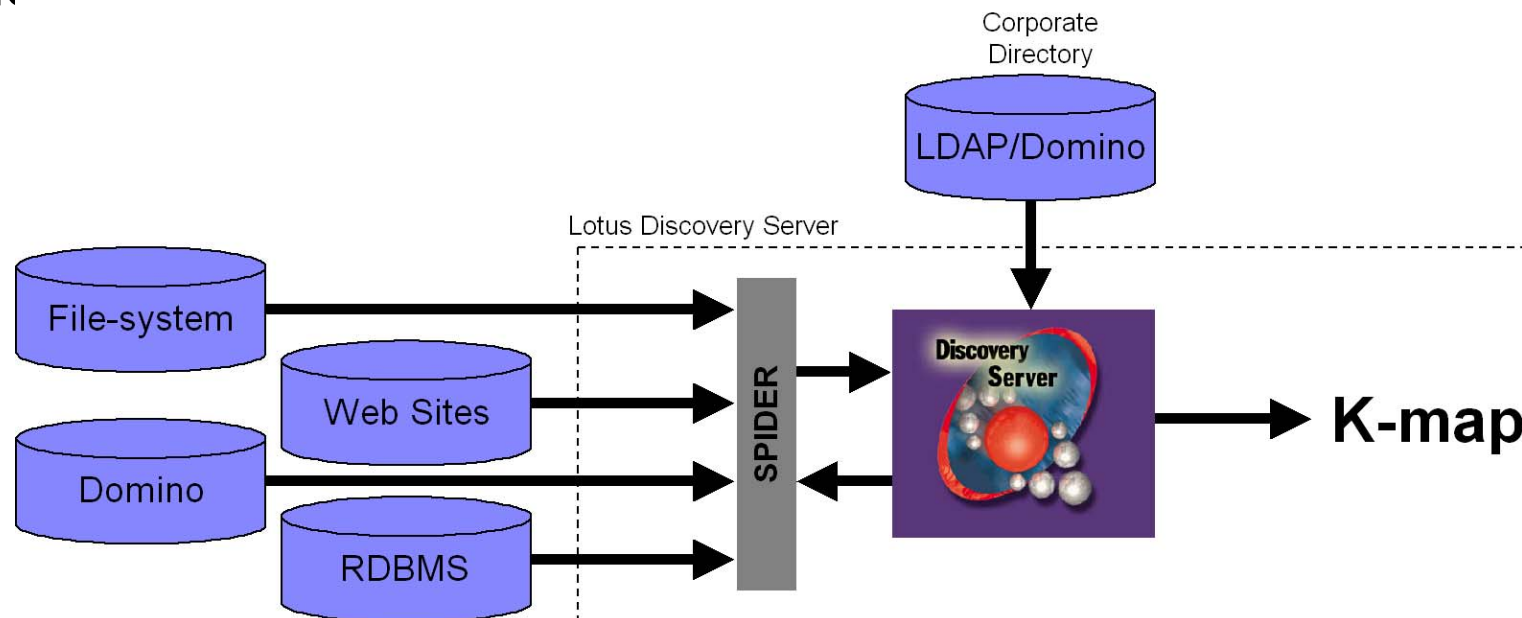
Previous Companies  
 Previous Titles  
 Education  
 Languages  
 Interests

Contact Information  
 Affinities  
 Current Job  
 Background

Last Updated:  
 01/14/2001 09:32 F

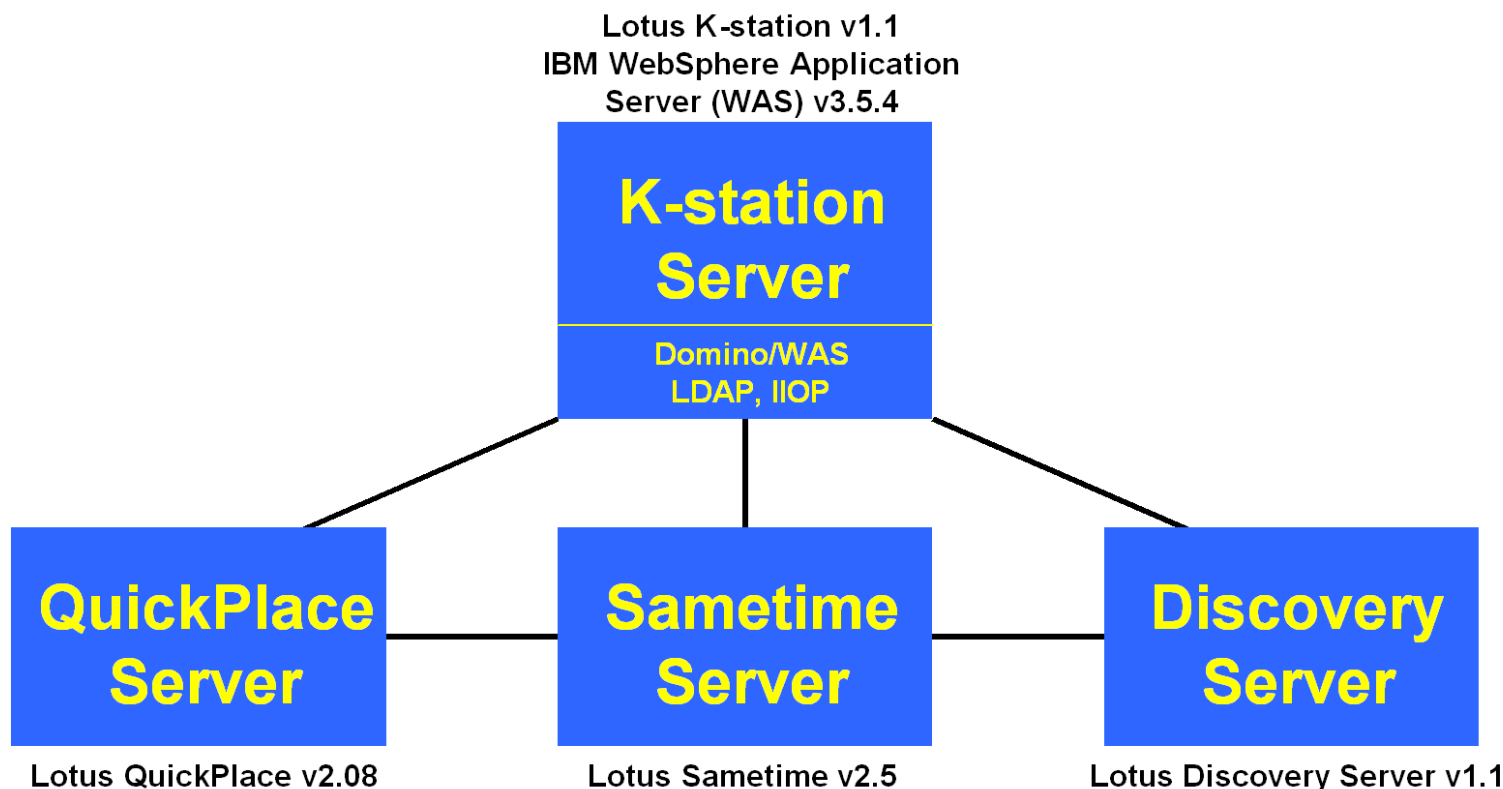
# How LDS Works

- Runs on top of Domino R5 - stores taxonomy in IBM DB/2
- Provides a total browser interface for administrators and end-users
- Corporate Directory is used to produce people profiles
- 'Spiders' are used to read data from target sources



# How we Implemented LDS

- Integrated into a single collaborative portal using Lotus K-station
  - Four production servers



# Creating the K-map

Tracey Angove



# The Process of Creating a K-Map

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- The process is a combination of manual and automatic processes.
  - ▶ LDS dynamically classifies & categorizes new and updated information it finds
  - ▶ Generation of useful and meaningful labels requires manual intervention by subject matter experts.

# Steps to creating the K-Map

- Defining Source Data
- Selecting a 'Training Set'
- Generating the K-Map
- Refining the K-Map



# 1. Defining the Source Data

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- Conduct an information audit
- Use Subject Matter Experts (SME's) to identify source data
- Create the 'Stopword' list
- Select data that:
  - ▶ are high quality (text-rich)
  - ▶ contain representative content
  - ▶ reflect the organization & its work processes, policies and information requirements
  - ▶ be accessible
  - ▶ include necessary metadata

## 2. Select a 'Training Set'

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- create an initial K-map using a subset of the source data
- include a x-section of all relevant data repositories
- Target the richest documents (less rich documents can be added after the K-map has been trained)
- Consider the consistency and quality of metadata fields (eg. Title, Author, Category) - consider a metadata clean-up

## 3. Generate the initial K-Map

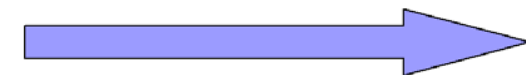
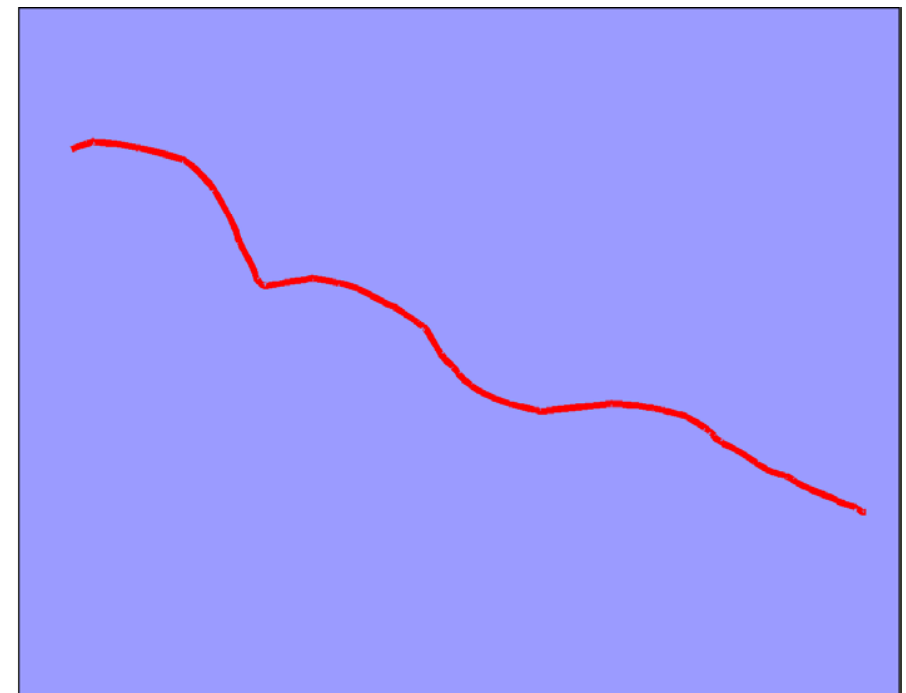
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- The initial K-map categories will not make sense
- categories will need to be re-labelled based upon a review of the document they contain
- documents will need to be moved between categories

## 4. Finalise the K-Map

- the K-map categories has been agreed
- the remaining data can be categorised
- the K-map will continue to learn

Level of  
Human  
Intervention  
Required



Time

# Wrap Up

# Business Value

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- Discovery of intellectual assets for reuse
- Discovery of bad information
- Discovery of expertise
- Organisation of disparate and previously disconnected information
- Breaking down the meeting culture



# Questions?