



# Optimizing Knowledge Management with Proven Marketing Strategies

Aspen Technology's Knowledge Management Initiative

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April 27, 2012

# Agenda

- About AspenTech
- Why Market Knowledge Management?
- Brand Recognition is Critical
- Define and Understand Your Target Audience
- Identify Customer Needs
- Leverage the “Marketing Mix” to Advance KM Initiatives
- Utilize a Variety of Metrics to Evaluate Your Successes
- Document and Share Lessons Learned for Continuous Improvement
- Key Takeaways

# About AspenTech

- AspenTech is the world's leading supplier of software that optimizes process manufacturing
  - Over 75,000 users at over 1,500 of the world's largest petroleum, chemical, engineering and construction, and pharmaceutical companies
  - Founded in 1981, we're a global company with 1,300 employees in 30+ countries
- The Knowledge Management Office (KMO) was formed in 2001 to implement standardized processes and tools to capture and share intellectual capital and best practices
  - The KM vision: *"All employees will have access to the information, knowledge, and processes they need to achieve their individual objectives and help AspenTech meet its strategic goals."*

# Why Market Knowledge Management?


- KM initiatives can fail without promotion and marketing
- Using marketing strategies to “sell” KM programs can
  - Improve adoption rates
  - Shorten the learning curve
  - Increase awareness of KM benefits
  - Create value
- Knowledge managers must follow a framework similar to a marketer
  - Identify the target audience
  - Define customer needs (knowledge gaps)
  - Develop, brand and distribute the (knowledge) product
  - Document lessons learned for continuous improvement
  - Utilize metrics to evaluate success

# Who are We?

## Brand Recognition is Critical

- Branding creates the perception that your KM initiative is the best solution and defines the customer's expectations of your product
  - A brand is “the promise we make to our customers about who we are and what we stand for”
  - Branding builds customer trust and loyalty through a unified look and consistent messaging, continuously reinforcing product value
- Brand everything! Our branding includes:
  - Team name: Knowledge Management Office (KMO)
  - Vision, slogans, logos, email address
  - Intranet name: “Sherlock”
  - KM Community of Practice: “Sherlock Sherpas”
  - Annual Knowledge-Sharing Awards
  - KM collateral and resources
  - Sherlock Application Lifecycle Methodology
  - Consistent look and feel; KMO Rep. on every page of intranet
  - Communications: “Sherlock: Did You Know” series
  - Us! With 30 combined years at AspenTech, we embody the brand in all we say and do

# Branding: KMO Home Page



Home

Welcome Knowledge Management Office | Site Actions

Organization Policies Baker Street Technical Offices Orientation Workrooms

Help Feedback  
Bookmark Site Map

All Sites Advanced Search

Home > Organization > Human Resources > Knowledge Management Office


## Knowledge Management Office

View All Site Content

**Knowledge Management Office**

- Internal Communications Request
- KMO Work Request

Recycle Bin




**Knowledge Management Office (KMO) Vision:**

*All employees will have the access to the information, knowledge, and processes they need to achieve their individual objectives and help AspenTech meet its strategic goals.*



*Sherlock Sherpa Wiki*

Click here for the Sherpa Wiki, an advanced resource for knowledge management and Sherlock. Feel free to add or update entries.



**Sherlock Sherpas**

View the list of **Sherlock Sherpas**, employees who manage Sherlock sites and applications for their business units.

**Sherpa Tools**


- KMO Project Request Form
- Usage Report Request
- Master Quest Report Template
- Usage Report Instructions
- Search Keyword & Best Best Request
- Best Bet List for Review
- Sherlock "Did You Know" Suggestion Box
- Survey - Sherlock Application Usage Evaluation
- Survey - Email Message Template
- Success Story Submission Form

The KMO manages Sherlock. Team members Kim Harvell and Tammy Viles are each assigned to consult with various business units within AspenTech to help them document and share their knowledge, policies, business processes and employee communications via their organizational areas and workrooms. Kim and Tammy are available for Sherlock demos and training for individual teams and business units upon request.



**Kim Harvell**

The KMO helps AspenTech's business units gather and analyze employee input and other information via surveys; the results are used to improve business processes.



**Tammy Viles**

Supporting the KMO in managing Sherlock are the **Sherlock Sherpas**. Created in 2009 to support the Sherlock migration to the latest SharePoint technology, the Sherlock Sherpas are the first line of support for their business units and are invaluable in ensuring that Sherlock content is current, accurate and relevant.

**Internal Knowledge Management Resources**

- Access Sherlock Help
- View Recorded Tour Through Sherlock
- Email the KMO
- View List of Sherlock Sherpas
- Request an Internal Communication

**External Knowledge Management Resources**

- Cognitive Edge
- KM News
- KM World

**Related Links and Workrooms**

- KMO Workrooms
- Sherlock Sherpa Workroom

# Branding: Sherlock, Sherpas, Communications



Main Intranet Logo

Knowledge Management Office > KMO Workrooms

Welcome Knowledge Management Office

Organization Policies Baker Street Technical Offices Orientation Workrooms

KMO Workrooms > Sherlock Sherpas

## Sherlock Sherpas

View All Site Content

Corporate Communications

KMO Only

- Reports

List of Sherlock Sherpas

Project: Career Development

Project: HR Site Redesign

Projects: QA and PMO

Reusable Resource and Archive Library

Sherlock Administration Team

Sherlock Application Lifecycle

Sherlock Sherpa Wiki

Sherlock Sherpa Workroom

**Sherlock Sherpas**

Sherlock Sherpas manage Sherlock sites and applications for their business units. These individuals are content managers and "power users" and serve as the first line of Sherlock support for their business units and individual teams.

**Annual Knowledge Management Awards**

Early each calendar year, the Knowledge Management Office recognizes the contributions of Sherlock Sherpas over the past year with the Sherlock Knowledge Management Awards. Each winner created business value for AspenTech through their use of Sherlock to share knowledge and information important to their business unit. [Click here](#) to view the list of winners for the past three years.

The full list of Sherpas is displayed below.

**New!!** Click to expand the Sherpa business units, and you will see photos of many Sherpas.

Photo	Sub-Org	First Name
Field Ops - EURA (1)		
Field Ops - Global Accts (1)		
Field Ops - NORAM (1)		
Field Ops - Pharma (1)		
Field Ops - Professional Services (3)		
Field Ops - Sales Operations (4)		
Field Ops - Telesales Direct (1)		
Finance (2)		
GCS&T (1)		
HR (6)		
IS&F (3)		
Legal (1)		
Marketing (15)		
Products - Business Planning (2)		
Products - Product Operations (4)		
Products - Quality Assurance (7)		
Products - R&D (4)		



Knowledge Management Office

## Sherlock Search: Did you know...

Did you search for something on Sherlock and not find it? Take the survey on Sherlock's search return page and let us know. We will help you find what you are looking for and use your experience to improve the "findability" of content published in Sherlock. Hearing from you about what's working and what isn't is vital to our continuous improvement program and will help us determine new "best bets" to add to Sherlock's search engine.

### Did You Find It?

Find what you were looking for? Yes? No? Partially? Provide your anonymous feedback and help us refine the search.

[Click to add your search feedback](#)

Just click on the green button on the right side of the Search returns page next time you do a Sherlock search; it only takes a minute.

\*\*\* Internal communication. Not for external distribution.

Targeted Communications

Sherlock Sherpas



Sherpa Recognition Gifts

# Define and Understand Your Target Audience

- Each audience has unique characteristics and needs that must be defined
- Understanding your target audience and the forces influencing their behavior ensures that you can utilize the value driver that is meaningful to that segment, delivering the right messaging about the KM “product”
- AspenTech’s KM initiative has several audiences
  - The employee base as a whole
  - Management and senior management
  - Individual business units
  - KM community of practice (“Sherpas”)
  - KM project-specific audiences (often cross-functional)



# Identify Customer Needs

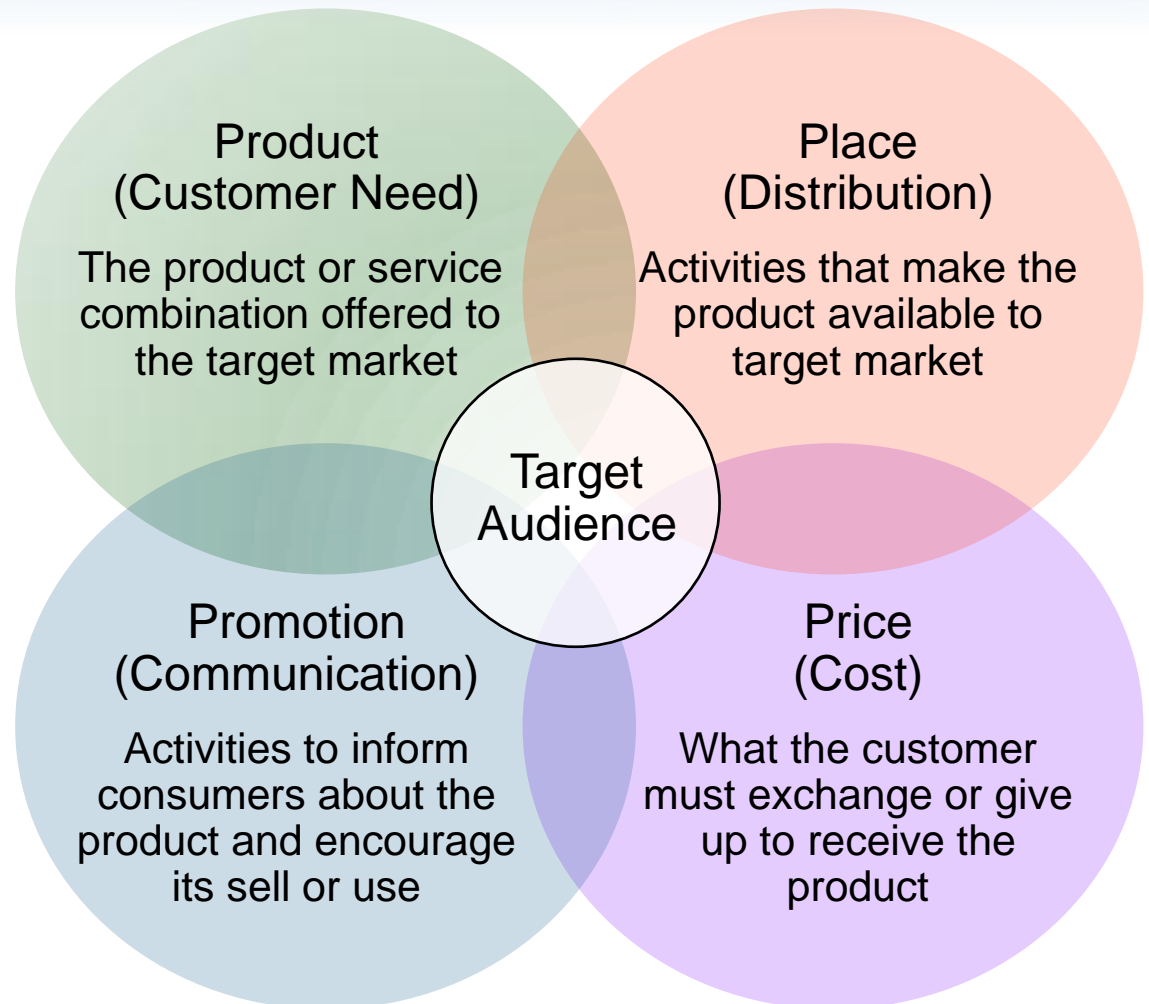
- Use your KM Community of Practice
- Translate annual corporate objectives into KM needs
- Facilitate requirements-definition workshops
- Hold executive meetings annually or more frequently to gather input and increase buy-in
- Develop and utilize healthy customer relationships
- Utilize a project request form
- Listen! Aggregate individual needs and extrapolate trends to a corporate level
- Deploy a company-wide survey every few years to measure attitudes toward knowledge-sharing

# Identifying Customer Needs: Company-Wide Knowledge-Sharing Survey

- A company-wide survey is a great way to measure KM
- Use results to seed focus groups
- Share results with the management target audience to gain their buy-in and stimulate investment of resources
- Results influence KM strategy
- Act on results, then “sell” the new and/or improved product
  - Problem: survey responses indicated employee dissatisfaction with searching and finding content
  - Solution: “Project Find It!” was launched to improve “findability”
    - Search configuration was updated, keywords and best bets added
    - A communications campaign alerted employees to improvements
    - Microsoft now raves about our SharePoint search statistics (average # of searches per day) during performance audits

# Leverage the “Marketing Mix” to Advance KM Initiatives

- Marketing Mix – a set of controllable tactical marketing tools that companies blend to produce the response it wants from the target market
- Consider each component when rolling out a KM initiative
- Each component may vary depending on the target audience or initiative



# The AspenTech KM “Mix”

## KM Initiative (Product)

- KM consulting / KM brand
- Sherlock applications, team workrooms, home pages
- Surveys
- Meeting facilitation
- Best practices / project mgmt
- Communications
- SharePoint knowledge/support

## Communications (Promotion)

- Road shows
- Demonstrations / training / tours (live and recorded)
- Executive meetings
- Targeted communications
- Branded gifts
- Lunch-n-Learns
- Sherlock Sherpas / evangelists

## Distribution Channels (Place)

- Sherlock, the corporate intranet and secondary applications
- KMO Partnership with CIO / IS
- Sherlock Sherpas / Sherpa Wiki
- Sherpa Workroom / tools
- Configured search and intuitive navigation

## Investment (Price)

- Time
- Resources
- Opportunity cost
- Keeping current content
- Adherence to KM standards, governance and methodology
- Change of habits; adopting knowledge-sharing culture

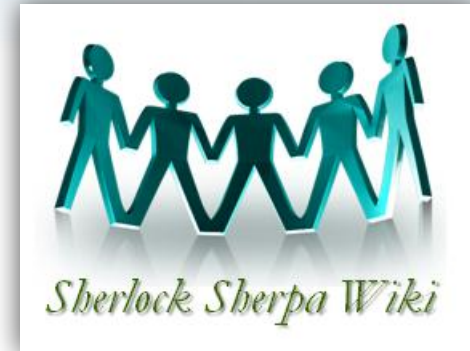
# Utilize a Variety of Metrics to Evaluate Your Successes

- Surveys: both company-wide and for targeted audiences
- Meetings with senior executives and employee focus groups
- Sherpa KM Community of Practice individual goal-setting and measurement
- Analysis of intranet data
  - Usage reports overlaid with demographics and tenure to assess adoption – overall and at the business unit / application level
  - Search trends reporting
- Benchmarking
  - Conference attendance, interviews with external KM colleagues
  - 3<sup>rd</sup> Party resources, e.g., APQC's KM tools, the Worldwide Intranet Challenge
- Seek External KM Recognition



# Share Lessons Learned for Continuous Improvement

- Documenting lessons learned is a continuous and collaborative activity
  - Provide a platform; we use a wiki
  - Employ a success story process and template
  - Conduct user interviews
  - Perform a set of project closeout activities (part of the Sherlock Application Lifecycle Methodology)
  - Utilize user feedback forms (e.g., search feedback mechanism)
- Sharing these lessons is also an ongoing process
  - Highlight lessons in learning environment
    - Sherlock Sherpa Training Series
    - Monthly Knowledge Management Meetings for Sherpas
  - Send targeted communications (“Sherlock: Did You Know”)



# Key Takeaways

- Brand, brand, brand! Have fun with branding and promotion
- Identify your audiences, understand their value drivers and target your messaging to each segment
- Develop a multi-pronged approach to identifying customer needs
- Create and motivate a highly-engaged KM community of practice and use it to promote adoption of KM
- Offer a broad set of KM products, and change your “mix” as necessary
- Measure and communicate successes and build lessons learned into your KM initiative

# Appendix

## Sherlock Application Lifecycle Methodology



# Sherlock Application Lifecycle Methodology

- Project Requests are evaluated and presented to business owners for approval before work begins
- Roles and responsibilities are well-defined
- Based on Peter Drucker's philosophy of "What gets measured gets managed," quarterly reports will be provided to help business units evaluate their use of Sherlock as a business tool
- Dormant, low-use or problematic sites will be reviewed periodically to determine whether archival or updating is appropriate

