

## Expertise Location Is More Successful When Tied to a Formal KM Strategy

### *Analysis of data from APQC's Trends in Expertise Location survey*

A majority of organizations are experiencing demographic shifts in their work forces, with the Baby Boomers starting to retire en masse, Millennials comprising an ever-larger percentage of staff, and Generation X moving up the career ladder to take on positions requiring more expertise and judgment. In environments with few experts and many potential learners, experts and long-tenured employees need to be able to share their knowledge broadly and efficiently across the work force. At the same time, less experienced colleagues need ways to ask questions, get information and advice, and solve problems collaboratively.

While most organizations want their employees to have access to experts and expertise, different firms approach this challenge differently. Some build tools and approaches for expertise location into broader knowledge management (KM) strategies designed to ensure that content and knowledge flow effectively through their organizations. Others, however, do not integrate their expertise location solutions into KM strategies—either because they do not have such strategies or because they see expertise location and KM as separate endeavors. A third group incorporates some elements of expertise location, but not others, into KM strategy. For example, the KM team might facilitate access to expertise through communities of practice, but another part of the business (such as HR or IT) is responsible for the employee profile system.

Does it really matter whether an organization integrates its expertise location tools and approaches into a comprehensive KM or knowledge sharing strategy? APQC's data suggests it does. According to the [2013 Trends in Expertise Location](#) survey, organizations that incorporate expertise location into broader KM strategies:

1. offer a wider variety of tools and approaches to help employees find and connect with experts and expertise;
2. provide more robust expertise location solutions, allowing employees to do more with the tools and approaches available; and
3. achieve higher rates of participation in expertise location.

### PROVIDING EMPLOYEES WITH OPTIONS FOR EXPERTISE LOCATION

As part of the “2013 Trends in Expertise Location” survey, APQC asked respondents about the tools and approaches their organizations use to ensure employees have access to the experts and expertise they need to do their jobs. The options included everything from a designated “ask the expert” service to more informal, social tools such as blogs and microblogs.

The data shows a clear relationship between an organization’s decision to integrate its expertise location program into a KM strategy and the number of channels the organization provides to help surface experts and expertise. Among survey respondents that reported having some sort of expertise location approach, those whose organizations incorporated expertise location into formal KM strategies offered, on average, 4.93 different expertise location tools and approaches (Figure 1). Organizations that tie only some elements of expertise location into KM strategy are slightly behind that benchmark, offering an average of 4.56 tools and approaches. However, organizations with no links between expertise location and KM strategy offer only 3.29 tools and approaches on average.

*Average Number of Tools and Approaches Supporting Expertise Location*

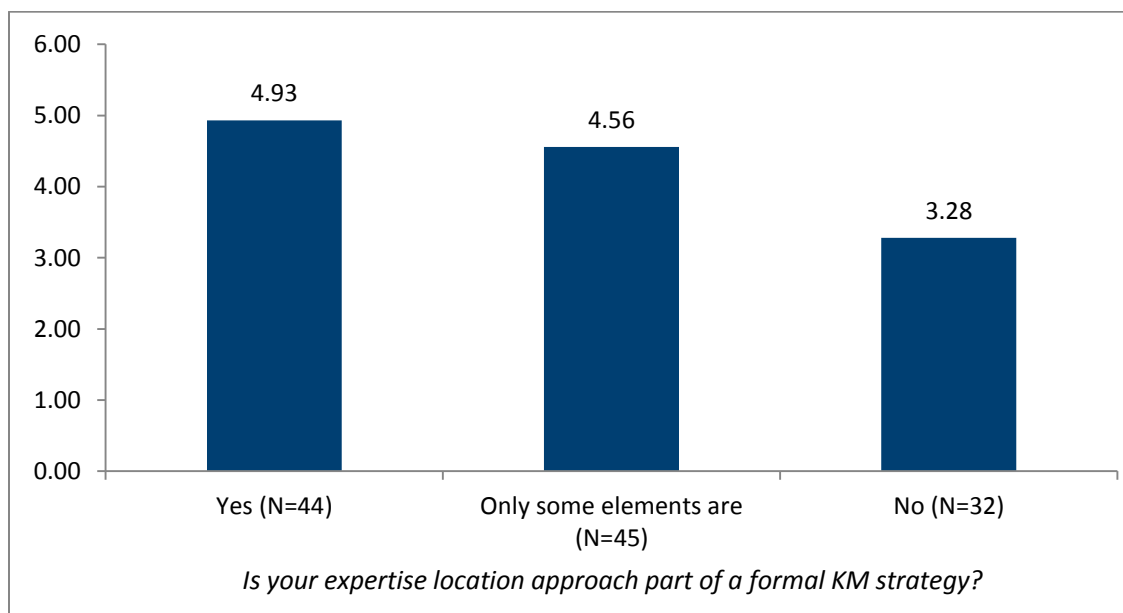


Figure 1

There are many reasons why organizations that position expertise location as part of a comprehensive KM strategy might offer a wider variety of tools and approaches. First, linking to KM provides an obvious “home” within the organization for expertise location, increasing the probability that it will receive significant attention and funding. The incorporation of expertise location into a KM program also shows that the organization has thought strategically about the need to connect people to experts and expertise, all the different ways in which that can be achieved, and which methods might work best (the answer to which may vary for different segments of the work force). If expertise location is positioned as part of a robust, comprehensive knowledge strategy targeting business needs, then senior leaders are more likely to fund a suite of tools and approaches, rather than just one or two. In addition,

organizations that integrate expertise location and KM may have more mature knowledge sharing programs that offer diversity in terms of all sorts of KM tools and approaches, including those for expertise location.

### OFFERING BOTH “CLASSIC” AND SOCIAL TOOLS AND APPROACHES

In addition to offering a greater overall number of tools and approaches, organizations that build expertise location into their formal KM strategies are more likely to adopt certain core expertise location approaches. As Figure 2 shows, organizations that address expertise location in their KM strategies are significantly more likely to leverage communities of practice and networks to connect employees to experts and expertise. This is important because survey respondents identified communities of practice as the No. 1 most effective expertise location approach in their arsenals.

Organizations that link expertise location to KM strategy are also more likely to adopt other core expertise location approaches, such as discussion forums and searchable employee profile systems. However, in these categories, the data indicates no discernable difference between organizations that integrate their entire expertise location solutions with KM and those that integrate only some tools and approaches.

#### *Percentage of Organizations Offering Core Expertise Location Approaches*

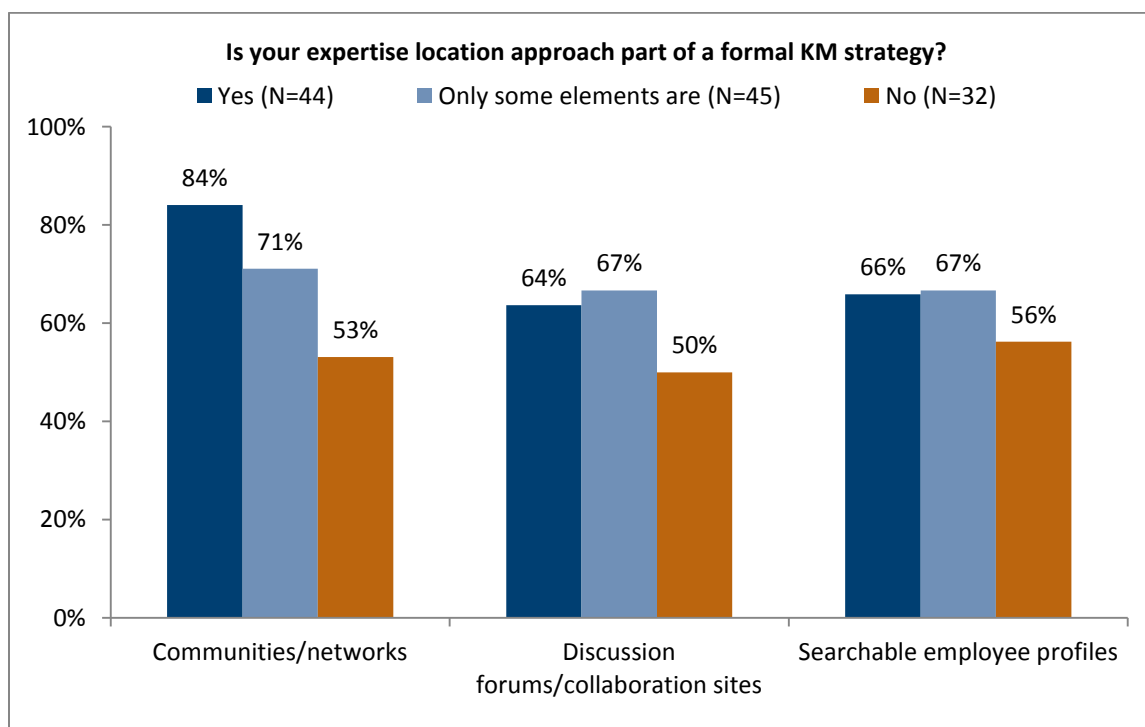


Figure 2

Links to KM strategy also mean that organizations are more likely to use social tools such as blogs, wikis, social networking, and microblogging to facilitate access to experts and expertise (Figure 3). Although survey respondents did not identify these tools as the most effective for expertise location, many cited them as important ancillary channels for connecting employees with knowledgeable colleagues and getting questions answered, especially in situations requiring quick responses.

### *Percentage of Organizations Offering Social Tools to Enable Expertise Location*

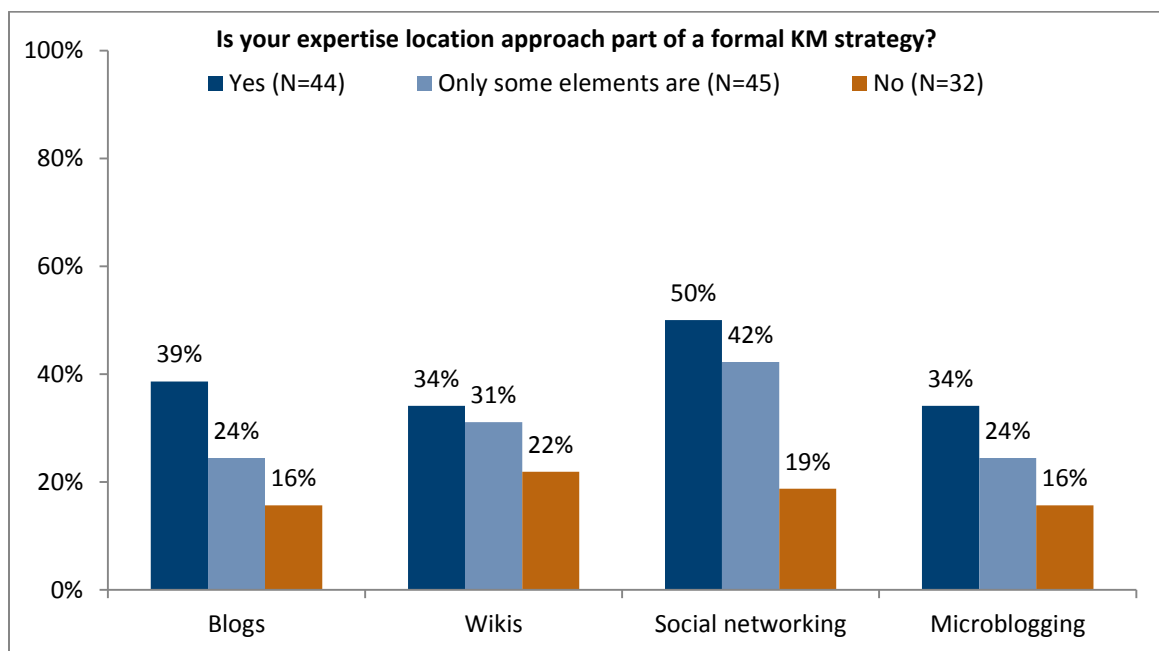


Figure 3

## CAPABILITIES ENABLED THROUGH EXPERTISE LOCATION

Although organizations that do not merge expertise location into broader KM strategies support fewer tools and approaches to help employees find and reach out to experts, the number of solutions offered is not necessarily an indicator of effectiveness. It is possible that organizations providing fewer options still achieve the same or better results.

However, looking at the tasks that employees can perform using their organizations' expertise location systems, firms that integrate expertise location into KM strategy are far more likely to enable key capabilities related to expertise location (Figure 4). Specifically, employees at these organizations are at least twice as likely to be able to:

- ▶ find out about colleagues' skills and expertise,
- ▶ locate and communicate with colleagues based on shared interests or challenges,

- ▶ find published experts on a specific topic, and
- ▶ identify experts or go-to people based on their contributions and behaviors.

### Tasks Enabled by Expertise Location Tools and Approaches

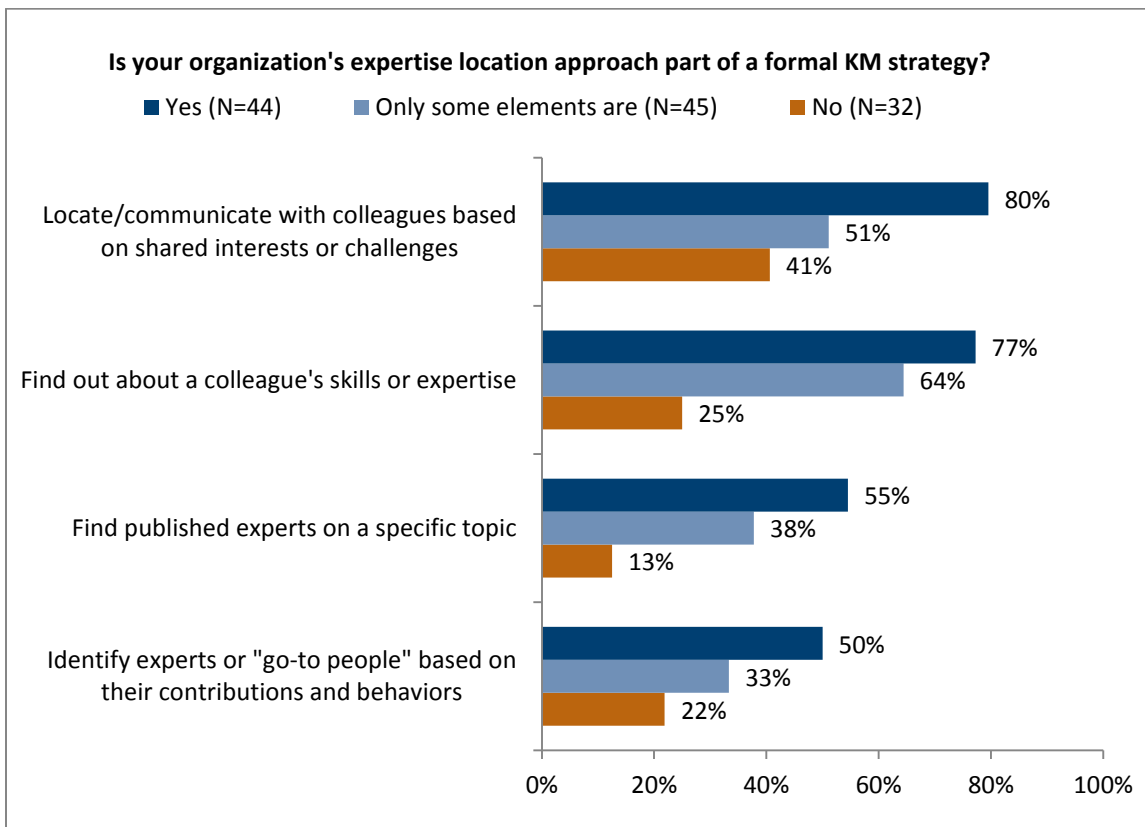


Figure 4

Of the tasks listed in Figure 4, the most critical is the ability to identify experts and knowledgeable people based on their contributions and behaviors. At organizations offering this capability, employees can surface knowledgeable colleagues based on not only the job titles and expertise areas listed in their profiles, but also the actions they take—the articles and wiki pages they author, the communities to which they belong, the discussion threads in which they participate, and so on. Such data tends to provide a more holistic, accurate picture of which colleagues are most knowledgeable about a particular topic *and* will be willing to share advice and expertise.

The ability to identify experts based on contributions and behaviors is strongly correlated with the overall effectiveness of an organization's expertise location program. One-hundred percent of organizations that report being very effective at meeting their expertise location goals provide this capability, compared with only 27 percent of other organizations.

## PARTICIPATION IN EXPERTISE LOCATION TOOLS AND APPROACHES

The expertise location tools, approaches, and capabilities that organizations provide are important indicators of the ease with which employees can find appropriate experts and reach out to them for information and guidance. However, even the best toolkit is meaningless if employees do not use the tools and approaches available to them.

As Figure 5 shows, many organizations are still struggling to drive participation in their expertise location tools and approaches. However, organizations that fully incorporate expertise location into their KM strategies are achieving comparatively high participation rates, with 39 percent engaging more than half of their target work forces. By contrast, among organizations that do not link expertise location to KM strategy or that do so only partially, only 8 percent have achieved a 50 percent or above employee participation rate. Moreover, four out of five of these organizations are struggling severely, with less than 25 percent of the target audience participating in expertise location tools and approaches.

### *Rate of Work Force Participation in Expertise Location Tools and Approaches*

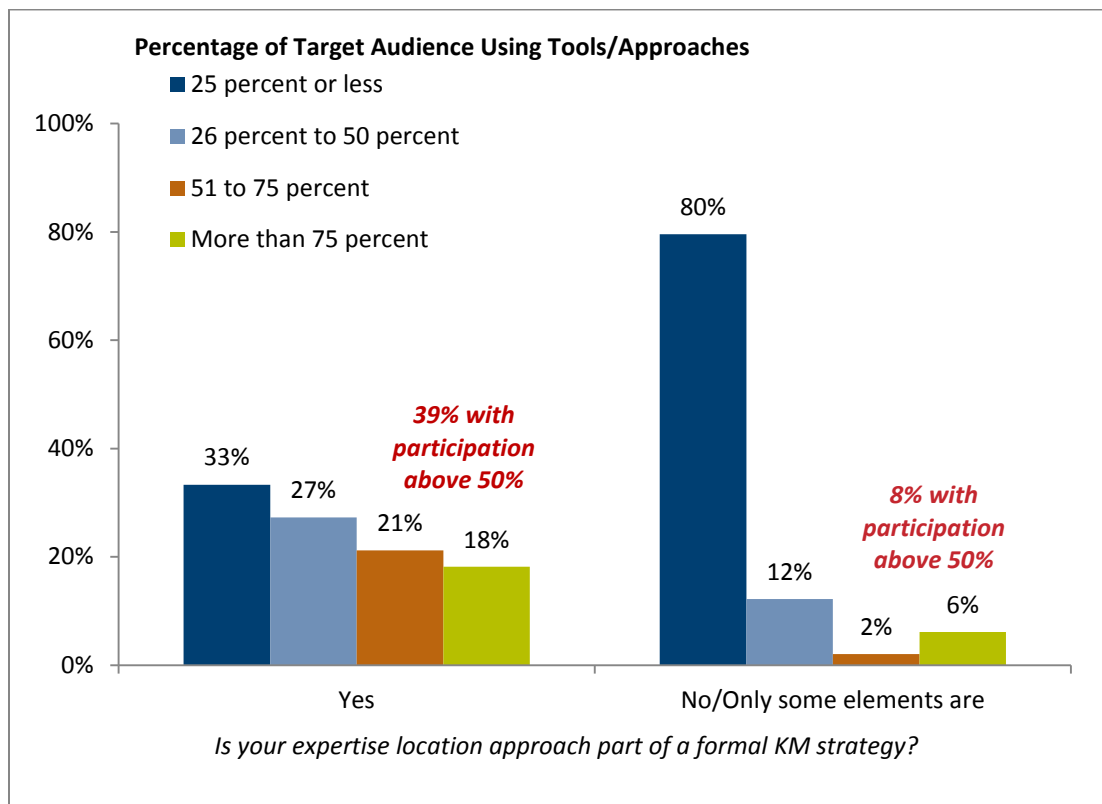


Figure 5

Why are organizations that tie expertise location to KM strategy achieving such dramatically better participation rates? Part of the reason may stem from the greater variety of tools, approaches, and capabilities offered by these organizations. However, linking expertise location to KM strategy also provides other benefits. By approaching employees' need to access expertise as a business priority supported by a clear strategy, senior leaders communicate the importance of both sharing and seeking expertise. In almost every KM study APQC has conducted, senior leadership endorsement is an important driver of work force engagement and participation. In addition, a dedicated KM function or team can increase participation by ensuring employees are aware of the available tools and approaches, providing training on how to use them, communicating the benefits of participation for both experts and learners, and creating rewards and recognition schemes to encourage desired behaviors.

## CONCLUSION

Many organizations have a hard time persuading employees to share through expertise location tools and approaches. Even when experts are very willing to answer questions and mentor colleagues when approached one-on-one, they may argue they are too busy to fill out a detailed profile about their expertise or log into a microblogging tool. Similarly, junior employees want help and advice—at least in theory—but many don't know where to turn for guidance, become frustrated trying to get a fast comprehensive response, or choose to skip this step to speed up their delivery times.

For both experts and knowledge seekers, engagement becomes easier when organizations incorporate expertise location into comprehensive strategies that formalize the need, provide clear guidance on expectations, and articulate the impact of participation on business performance. When employees are presented with a menu of options for expertise location and understand the value proposition for participation, they are much more likely to experiment with the available tools and approaches and, if they are effective, incorporate them into their daily routines.

For additional information about the survey results on which this article is based, including demographic data on the survey respondents, see [Trends in Expertise Location: An APQC Knowledge Management Metric Report](#).

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