



A Deep Dive into a Knowledge Management Process Building Healthy Communities of Practice (CoP)

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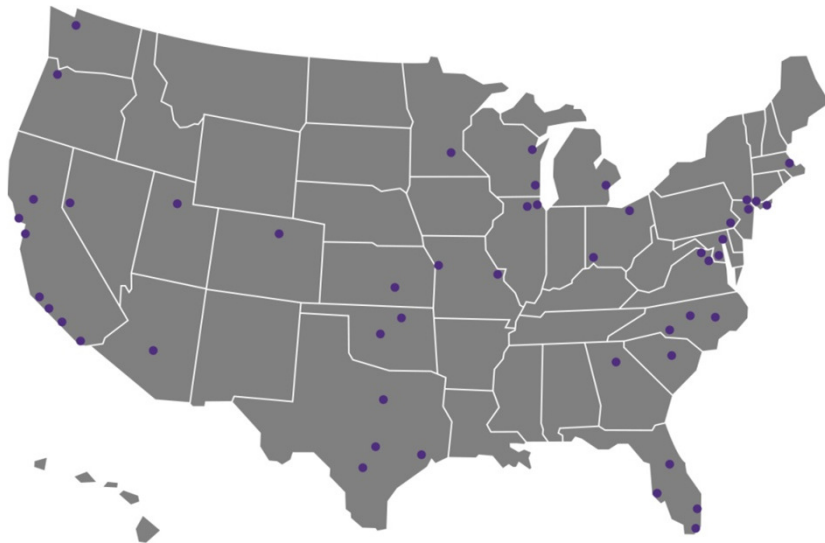
APQC Member Meeting
November 9-10, 2011

KSource[®]
seek · share · succeed

 Grant Thornton

Grant Thornton at-a-glance

Founded in 1924, **Grant Thornton LLP** provides audit, tax and advisory services to both public and private US-based clients



	Grant Thornton International Ltd.*	Grant Thornton LLP**
Revenues	US \$3.7 billion	\$ 1.09 billion
Personnel	29,974	5,249
Partners	2,511	514
Offices	488	50
Statistics as of:	30-Sep-10	31-Dec-10
* Collective figures of Grant Thornton International Ltd. member firms		
** US member firm of Grant Thornton International Ltd.		

What We Heard back in 2007

Prior to KSource®

"I need to know more than my targets/clients."

"Each individual group is doing things their own individual way."

"How do we architect the intranet so people can find things? It's a swimming pool today."

"KM is a critical part in business development ...knowing the skills of our people ...having easy access to client testimonials..."



"At least 75% of what we do is not brand new."

"The sharing of quality information gives you a competitive advantage."

Process Dilemma

Big Bang?

OR

One-by-One?



Implementing KM using the Group Wave Approach

CoP Methodology

Planning and Needs Analysis	Design	Development	Deployment	Operations
<ul style="list-style-type: none"> Objectives & Audience Definition Content People Network Business Processes Project Management User Needs Change Management 	<ul style="list-style-type: none"> Content Design Business Process Design People Network Design Taxonomy Design User Interface Design Infrastructure Design Change Management 	<ul style="list-style-type: none"> Content Development Contribution Development Testing Change Management Development 	<ul style="list-style-type: none"> Change Management Implementation Training Performance Management Support Infrastructure Management Technical Deployment/Rollout 	<ul style="list-style-type: none"> Authoring Management Approval & QA Management Content Management Access Management Knowledge Sharing Promotion, Support, Project Management & Continuous Improvement

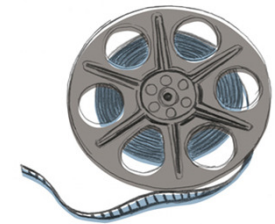
Promoting KSource[®] Success Stories

I am...

My need...

My KSource Connection...

My action...



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COP Methodology

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CoP Operations Health Check

What is it? What is the process?

1. Pre-work: Self-assessment scorecard
 - Strategy Alignment
 - Content Management
 - Change Management



2. 90 minute collaborative session with BU CoP Sponsor, CoP Knowledge Manager and National KM team
3. Outcome: Action items to "raise the bar" and "align"



Search

Advanced Search



Tax Symphony

- ▶ Tax Symphony News
- ▶ Policies
- ▶ Professional Reference
- ▶ Service Delivery
- ▼ Engagement Management
 - ▼ Client and engagement acceptance
 - ▼ Perform information gathering

- Coordinate pre-engagement planning meeting
- Prepare draft budget & profitability analysis
- Prepare client and engagement acceptance materials
- Prepare draft engagement letter and or statement of work
- Review all engagement materials

- ▶ Perform client and engagement acceptance materials approval process
- ▶ Perform client and engagement acceptance wrap-up
- ▶ Engagement team planning
- ▶ Engagement administration
- ▶ Tax Return Preparation
- ▶ Research
- ▶ Assembly and Closeout

Learning and Development



Engagement Management	Tax Return Preparation	Research	Assembly and Closeout
Client and engagement acceptance Engagement team planning Engagement administration	Planning Information gathering Workpapers Returns Wrap-up	Planning Research and documentation Research wrap-up	Processing e-file (if applicable) Engagement wrap-up



Level 3 Steps - Select a Role - ▼

*Click on level 3 step to view level 4 content

S	Coordinate pre-engagement planning meeting				
R	Prepare draft budget & profitability analysis				
R	Prepare client and engagement acceptance materials				
R	Prepare draft engagement letter and or statement of work				
S	Review all engagement materials				

Prepare draft budget & profitability analysis

Policies

- Tax Services Manual Chapter 6, Section 601(E)
Tax Return Process - Planning Phase: Budgeting and Pricing
- Tax Services Manual Chapter 3, Section 302
Risk Management: Tax Quality Assurance Review Program
- Firm Practice Bulletin 2005-02
Engagement Management Policies

Tools

- Form 1



Lessons learned

- Focus on the people side of the equation – the "A"

$$R_{\text{esults}} = Q_{\text{uality of solution}} \times A_{\text{cceptance}}$$

- Gain and maintain executive sponsorship
- Make sure you have the right people in the right roles
- Develop safety nets for your people
 - Communication
 - Learning
 - Rewards



Lessons learned (continued)

- Leverage focus groups and conduct pilots
- The need for vetted content remains for most organizations
- Develop a roadmap where features are layered in over time
- Integrate applications to streamline user experience
- Use established platforms to reduce total cost of ownership
- Continually listen for feedback – it is all around you





The Source of our Organizational Knowledge

"Connecting People to People"

"Connecting People to Content"