



May 2000

## Profiles of Twelve Knowledge Stewards

The Montague Institute Review is published by the Montague Institute and edited by Jean Graef.

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Knowledge “stewards” are information professionals that work on the front lines to help teams achieve specific business objectives -- land a client, implement a project, develop a product, solve a problem. We were interested to see that, like us, they use a combination of tools and techniques we call knowledge base publishing to capture and disseminate information. We recently interviewed twelve stewards and their managers to find out where they come from, what they do, how they do it, and what challenges they face. We would like to thank Society members Betsy Cogliano (MITRE), Charles Wasserburg (Accenture), and Beth Jacaruso (A. D. Little) for their assistance in identifying interview candidates.

### Why they're needed

In an environment where everyone has ready access to the same commercially published information and where technology has dramatically accelerated the pace of doing business, companies realize that the only sustainable advantage comes from connecting good people with relevant knowledge. The knowledge that matters most (because it's unique to the firm) is the know-how that employees and teams accumulate through success and failure.

But the most valuable information is useless unless it's deployed and applied to solve problems. That usually happens in teams in the outer layers of the corporate organization, close to customers and suppliers. Knowledge stewards help “mine” the firm's unique information and deploy it when and where it's needed.

Some companies formalize the knowledge steward role only after their clients start demanding greater “knowledge efficiency.” (See “Injecting Life into the Big 5,” Upside magazine). Clients don't want to pay for suppliers to continually reinvent the wheel. They don't want to lose time when solutions to their problems are buried, ignored, or lost or when key contacts leave for greener pastures. They do want suppliers that

can provide fast, responsive, integrated products and services.

### What makes them unique

The tasks that Knowledge Stewards perform -- finding, packaging, presenting, and disseminating information -- are not unique. But their work environment has six distinguishing characteristics:

1. *Team focus.* Unlike most librarians and corporate journalists, stewards support a specific team rather than a larger, more generalized group of users. Stewards are usually funded by the business unit, as opposed to corporate overhead.

2. *A variety of tasks.* Stewards are cross-functional, performing tasks in library science, journalism, business analysis, training, and sometimes software customization.

3. *Two-way information flows.* Stewards are responsible not only for identifying, presenting, and disseminating published information, they're also responsible for creating it and facilitating two-way information flows. They conduct interviews and debriefing sessions as well as train and support “knowledge facilitators” based at the client site.

4. *Close to the customer.* Stewards are typically closer to the customer than other information professionals, whether the “customer” is an internally funded project or an external client.

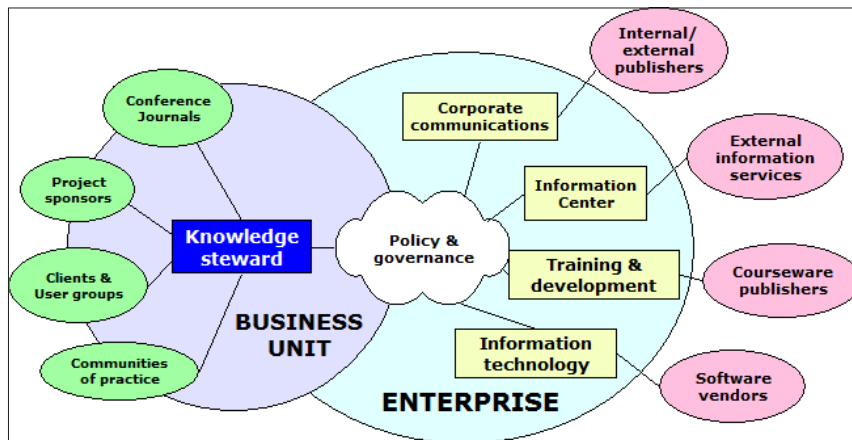
5. *“Lowest common denominator” tools.* Because they often work with “virtual” teams scattered around the globe, stewards make heavy use of simple, ubiquitous technology -- e-mail, fax, telephone, the Web. Although most also use and contribute to enterprise knowledge systems, they often customize desktop tools such as Microsoft Office, Filemaker, and Lotus Notes databases.

6. *Built-in feedback.* Compared with other information professionals, stewards spend less time on assessment tasks -- focus groups, knowledge maps, knowledge audits, and statistics -- and more time on implementation. Some track and report performance statistics, but most rely on anecdotal evidence and a close working relationship with their team members to assess their performance and justify additional resources. The impact of the steward's performance on the team's success is direct and relatively easy to assess.

her team can provide knowledge support, prepare company and executive backgrounds, package relevant credentials and "thought leadership" to prepare senior executives to make calls.

- *Project team support* (also called "engagement" support in consulting firms) -- Recruit, train, and support "knowledge champions" at key client sites to facilitate two-way information flow.

- *Ad hoc information requests* -- Find information (e.g. what are our credentials in this area?) or experts.



In terms of the tasks performed, stewards have much in common with tactical competitive intelligence researchers, but their scope is broader. Although knowledge of competitors can be helpful in closing a sale or developing a product, the steward's job is to focus corporate resources on solving the client's problem and in some cases helping to implement the solution. In short, stewards work closely with business units and specialized external resources (see the drawing above).

### What they do

The people we interviewed perform a variety of tasks ranging from ad hoc information requests to conducting workshops for the team's client companies. Here's a representative list of activities from Tanya Brincat, who supports Accenture's global financial services team from her base in Melbourne, Australia.

- *Sales call support* -- Attend Client Account Planning meetings to identify sales opportunities for which

- *Electronic newsletters* -- Summarize key developments, alert the team to new trends.

- *Training* -- Provide one-on-one and group training in use of the firm's knowledge tools. Includes orientation sessions for new employees.

- *Discussion groups* -- Make sure all questions posted to online discussion groups are promptly and completely answered.

Although all kinds of teams at Accenture receive both "content" and "operations" support, the emphasis can vary. According to Tanya, stewards that support industry, competency and line-of-business teams tend to be more content focused. Typical tasks include "harvesting" knowledge for internal repositories, reviewing and classifying documents, facilitating reviews by subject matter experts, developing home pages, electronic newsletters, and Web sites. On the other hand, stewards that support project teams place greater emphasis on proposal development support, knowledge base training, pro-

viding knowledge tools, and capturing project information.

### Cultural & environmental influences

Tasks can also vary according to corporate culture, which is influenced by the firm's history, size, and industry. The knowledge steward role seems to flourish in companies or divisions with one or more of the following characteristics:

- Relatively small. Close knit personal relationships foster teamwork and sharing.

- Relatively young. Responsiveness, flexibility, informal information sharing, and cooperation are still alive and well.

- *The culture draws from both enterprise and local perspectives.* There's a healthy balance between two approaches to performance improvement: reengineering work processes vs. hiring good people and leaving them alone. See "Building a knowledge base: process vs. heroes."

- *Minimal investment in archival activities.* Driven by regulatory, security, or scientific requirements, information professionals in R&D-intensive and heavily regulated industries have a large financial and psychological stake in preservation. Archives can't be abandoned, but they must be supplemented by additional functions designed to get the right information to the right people at the right time.

### Organizational setting

Some stewards, especially in situations where the role is new, operate as "lone rangers" -- defining their own jobs, customizing their software tools, and authoring all the deliverables. Others may assume the role on a part time or temporary basis, sometimes on loan from another organizational unit (typically the library). At the other end of the spectrum, some stewards are part of a robust knowledge management network. This can include a supporting cast responsible for informal information sharing (e.g. Communities of Practice), technical support, content management (i.e. quality assurance, standards enforcement, organization),

and geographic specialization.

In addition to the resources available in their own organizational units, stewards can draw on corporate resources such as the library, their peers in other business units, and knowledge management facilitators, coordinators, and managers. (For more information on Arthur D. Little's system of knowledge stewards, advocates, and coordinators, see "Knowledge management at A. D. Little.")

Some of the people we interviewed are really knowledge steward managers. Some have dual reporting relationships – e.g. to the project or practice team and the library. Others are individuals serving the needs of a particular business unit. Arthur D. Little has about 40 stewards -- 40% are consultants, 40% are librarians (like Rob Rader and Roseanne Castellino), and the remainder are administrative. Accenture has about 400 knowledge management and research staff. Included in this group are 13 or 14 managers with responsibilities similar to Anthony Coker and Peg Hay.

### Profiles

The people we interviewed represent a variety of work environments and backgrounds. Some are full time knowledge stewards; others are part time. As a group, they enjoy their work and value the opportunity to make a direct contribution to their team's success. Three are based in other countries; the remainder are based in the U.S.

### Stewards with library science backgrounds

Beth Roberts (MITRE Corporation). The majority of Beth's experience at MITRE has been doing project work for the firm's government clients, but she also spent a year in the MITRE library. Half of her time is currently spent as a knowledge steward publishing two internal electronic newsletters. She spends 10 - 12 hours per week on each newsletter. The remainder is devoted to project work for MITRE's Common Data Environment group. Her work is funded by three different sources. As a librarian, she's well qualified to

identify articles in the "open source" literature (publicly available articles as opposed to classified material). As a long-time MITRE employee, she knows her audience and her subject well. She's planning to develop a small taxonomy to enable customizing the newsletter contents to the special interests of people in her audience.

Rob Rader (Arthur D. Little). In addition to his library degree, Rob has an MBA in telecommunications. Currently he spends about half his time as a knowledge steward, the remainder as a secondary researcher. In his steward role he supports ADL's electronic business and telecommunications practices. This includes making sure that "quals" (documents that describe ADL's capabilities in a certain area) are written and submitted to the firm's tracking system, preparing news alerts, and compiling information at the conclusion of a project ("debriefing"). Rob uses Filemaker to produce an archive of his newsletter stories and to maintain a personal list of contacts. He reports to a Knowledge Coordinator, who has responsibility for several different practices (see "Knowledge management at A. D. Little").

Roseanne Castellino (Arthur D. Little). Roseanne supports ADL's Operations Management practice, a role that was originally designed to take 50% of her time, but currently takes about a day a week. That's partly because the practice is in "rebuilding mode" with fewer projects to debrief. She also thinks it's because the role requires close relationships with the consultants -- difficult to cultivate when they spend most of their time on the road. Like Rob, the remainder of her time is spent on secondary research for people outside the team. She also does alerts, debriefings, and "quals." A debriefing may take from one to seven hours over the course of several days.

John McGorray (Intel). John has graduate degrees in library science and management and is completing a third masters in M.I.S. In his steward role, he supports Intel's Technical Manufacturing Group and serves as an informa-

tion consultant to other teams, such as Knowledge Management and Scenario Planning. His activities include setting up Web sites, producing e-mail alerts, maintaining a database of comments and annotations, and developing information "products" -- licensing, formatting, and repackaging commercially available content. He's also involved in mentoring library paraprofessionals.

### Stewards with sales, marketing, & management backgrounds

Ann Orens (marchFIRST). marchFIRST is a new company formed by the merger of US Web, CKS, and Whitman-Hart. The combined entity integrates three different cultures -- systems integration, creative services, and management consulting. Ann manages a group that extracts and synthesizes "engagement" (client project) information, publishes information in a knowledge system, trains people how to use it, and does systems development. With a masters in history and experience in sales, marketing, and product development in the publishing industry, Ann has a journalism orientation. Her staff's deliverables are used not only by project teams but also by the firm's public relations function. The challenge for the newly merged company is to integrate multiple information processes and technologies. The prototype of the knowledge base Ann's staff currently uses was originally developed in Microsoft Access, then implemented in SQL Server.

Peg Hey (Accenture). Prior to getting involved in helping Accenture develop knowledge systems, Peg was a theatre manager and freelance business instructor. With ten years experience in the food industry, her team currently supports the food and pharmaceutical practices for Accenture. She works closely with senior partners to identify hot trends. Her group produces client presentations, company profiles, and market analysis -- some of which turn into products that are sold to external clients. The group also prepares debriefings, connects experts with practitioners, and supplies content for

industry-specific “channels” consisting of Lotus Notes databases, e-mail alerts, and Web sites. Peg stresses the importance of presentation skills, a willingness to “evangelize” about knowledge management, deep industry knowledge (i.e. issues, experts, industry structure, information sources), and attendance at meetings.

Celeste Ramos-Salado (Accenture). From her base in France, Celeste supports Accenture’s Communications and High Tech sales consultant teams. Prior to joining the firm, she worked in sales and marketing positions for an international computer company and an international marketing company. She has a B.S. in International Business. Her work as a Steward involves helping teams find and share information -- helping them land new projects and learn from each other. Celeste works in a truly virtual environment. She and her two associates are based in Europe. Her supervisor is in Miami, and the team members she supports are located in Europe and Latin America.

Teresa Azicate (Accenture). Based in the Philippines, Teresa has a background in export promotion within government agencies and export management in the private sector. She and a staff of ten -- the Engagement Knowledge Services group -- currently support teams doing work for Accenture’s government clients worldwide. She’s part of the Government Knowledge Network (GKN), which also includes groups that do content management, community of practice support, and technical support for the GKN. Like Celeste, her work focuses on helping teams find, integrate, and share knowledge. A key part of her work is recruiting and supporting “Knowledge Champions” -- engaging team members that work at the client site, retrieving and contributing information to the firm’s knowledge system.

Stan Garfield (Compaq). Stan started his career as a programmer, then managed a computer center, a timesharing operation, a customer center, and consulting teams. He began creating

lists of contacts and producing e-mail newsletters ten years ago. At Compaq, he manages the Professional Services Knowledge Network and the KM Program for the Professional Services division. He has one direct report (a project manager) and works closely with a virtual team of about 40 people (knowledge managers, consultants, proposal developers, and Web developers) who meet via teleconference once a week. His activities include publishing e-mail newsletters (9 daily and 7 monthly), maintaining a Web site with 500,000 pages, answering questions, and conducting virtual “guided tours” of available information resources.

Anthony Coker (Accenture). Anthony leads a research and knowledge services team of 8 - 10 whose goal is to provide a “one-stop-shop” for consultants in Accenture’s chemical industry practice. His group packages and delivers the information produced by the chemistry Knowledge and Innovation group. He describes what he does as a combination of library research, knowledge management, document management, and content understanding. Deliverables include abstracts, executive summaries, presentations, and Web portals. With a degree in chemical engineering and previous jobs in technical sales, market development, and product development, he has extensive knowledge of the field. Anthony often leads knowledge management workshops on site for Accenture’s chemical industry clients.

### **Stewards with human development backgrounds**

Tanya Brincat (Accenture). With a degree in behavioral science, Tanya joined Accenture’s Change Management consulting practice after university. She helped to develop Accenture’s knowledge system (the Knowledge Xchange) and, with a team of two associates, currently supports the firm’s Financial Services practice in the Asia-Pacific region. She’s part of the Financial Services Knowledge Management group, which consists of 38 people throughout the world. She contributed

the following testimony about her work:

“I would like to thank you for the information/comments you have sent, as they were very important to us. This helped us to finish the proposal on time, and I am sure this would not have happened without your contribution. The proposal turned out to be a success and it was a great opportunity for us to learn more about the credit card business, and specifically about the Merchant-Acquiring business. At this moment we felt the importance to be part of a global firm, as there are no challenges impossible to face when people around the world are willing to help you.” (Analyst, Buenos Aires).

Chaya Rosen (MITRE Corporation). Chaya’s educational background is in interpersonal communication and Organizational Management theories. Prior to working at MITRE her experiences were in Judaic studies and the study of Oral History. At MITRE, she enjoys focusing on the human side and cultural aspects of knowledge management. For the highly educated technologists and engineers utilizing the MITRE Information Infrastructure (intranet), she serves as an informal “knowledge champion,” helping to convey the principles and techniques of KM through a web site with related resources, training pages and book reviews. In addition, her other web work is to design user-centered sites for project staff to access and disseminate information. Most interesting is the fact that all of Chaya’s work has been successfully implemented from a remote location -- an indication of MITRE’s commitment to collaboration and knowledge sharing.

### **Challenges we face**

Although companies are beginning to recognize the crucial role that Knowledge Stewards play in improving team performance, some of them mentioned the need to “evangelize” about their work, develop better measures of their success, and expand pilot programs. A couple cited problems associated with organizational change -- integrating disparate systems, defining new roles, developing more efficient work

flows. Others cited technical issues, such as slow intranet connections in remote locations, lack of a common index to fragmented repositories, and the need for customized tools such as templates and databases (see “Your taxonomy is your future”). Some felt isolated from the practitioners they are supposed to support. Those with well-developed and well-funded programs spoke of the difficulty in finding new staff with the right combination of skills.

**An interesting job with a big impact**

The people we talked to were very upbeat. They like the variety, the fast pace, the chance to have a direct impact on the bottom line, and the contact with interesting people around the world. Using mostly lowest common denominator technology, they leverage a deep understanding of a business specialty and a broad variety of communications skills to both disseminate and harvest knowledge. As knowledge base publishers, they are totally focused on the profitability of the business unit they serve. They are truly on the front lines where knowledge is applied to create value for clients. □