From Knowledge Management to Community Management: Turning Challenges Into Opportunities

ECKM Conference 6-7 September 2018
Overview

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   My story so far

2. Observations
   Complexity and agility

3. EYK Journey
   EY Knowledge transformation

4. EYK Platforms
   Our products suite adoption

5. EYK Culture
   Knowledge and business KPIs

6. EYK Communities
   Their story so far
Introduction

My “sense” of identity

► 31 years in consulting
Technology consultant → Knowledge Manager → Social Knowledge Manager

► Current role
Global Advisory Communities lead in EY, helping 60K advisory people share knowledge and collaborate to win and execute innovative projects every day

► This is me @EY and outside EY
Apart from pictures, am I the same? What is different between the two? The community 😊
Observations

1. People like to share information and we now have the means to share at scale and at speed.

2. Knowledge sharing is shifting from people to content to people to people.

3. We all live in social matrix where virtually all resources can be found.

4. 70% of learning is achieved “on the job” vs in a classroom.

5. Technology is seamlessly integrated and core to every aspect of the organization.

6. Openness wherever possible, rules when necessary.

7. Successful implementation of social enterprise requires the right culture.

8. Complex and non complex tasks must be treated differently.

9. Organizations are living organisms, not machines.
Complexity requires agility ...

Rather than organization as machine, the agile organization is a living organism

From organizations as “machines” ...

... to organizations as “organisms”

- Quick changes, flexible resources
- “Boxes and lines” less important, focus on action
- Bureaucracy
- Silos
- Top-down hierarchy
- Detailed instruction
- Leadership shows direction and enables action
- Teams built around end-to-end accountability

There are five trademarks of agile organizations.

<table>
<thead>
<tr>
<th>Trademark</th>
<th>Organizational-agility practices</th>
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<tbody>
<tr>
<td>Strategy</td>
<td>• North Star embodied across the organization</td>
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<td></td>
<td>• Shared purpose and vision</td>
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<td></td>
<td>• Sensing and seizing opportunities</td>
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<td>Structure</td>
<td>• Flexible resource allocation</td>
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<td></td>
<td>• Actionable strategic guidance</td>
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<td></td>
<td>• Clear, flat structure</td>
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<td>• Clear accountable roles</td>
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<td>• With in governance</td>
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<td></td>
<td>• Robust communities of practice</td>
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<td></td>
<td>• Active partnerships and ecosystem</td>
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<td></td>
<td>• Open physical and virtual environment</td>
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<td></td>
<td>• Fit-for-purpose accountable cells</td>
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<tr>
<td>Process</td>
<td>• Rapid iteration and experimentation</td>
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<tr>
<td></td>
<td>• Standardized ways of working</td>
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<td></td>
<td>• Performance orientation</td>
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<td></td>
<td>• Information transparency</td>
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<tr>
<td></td>
<td>• Continuous learning</td>
</tr>
<tr>
<td></td>
<td>• Action-oriented decision making</td>
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<tr>
<td>People</td>
<td>• Dynamic people model that ignites passion</td>
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<tr>
<td></td>
<td>• Cohesive community</td>
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<tr>
<td></td>
<td>• Shared and servant leadership</td>
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<tr>
<td></td>
<td>• Entrepreneurial drive</td>
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<tr>
<td></td>
<td>• Role mobility</td>
</tr>
<tr>
<td>Technology</td>
<td>• Evolving technology architecture, systems, and tools</td>
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<td></td>
<td>• Next-generation technology development and delivery practices</td>
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*The 5 trademarks include 23 practices for organizational agility. 18 are based on survey research. Five additional practices are included that have emerged from recent experiences with large global companies transforming into agile organizations.*
Seven major trends are changing nearly everything about work today.

Today we create value by solving complex tasks anywhere and anytime.

Clear goals and self-management form trust and responsibility.
EY Knowledge journey

Knowledge Transformation

1. **New digital platforms**
   - Two thirds of EY using Discover, with 175k+ quarterly visitors viewing 2.3M pieces of content each month

2. **Modern, scalable architecture**
   - Our global library has grown to 132k pieces of content with 1.4k new submissions per month, with scalable improvements in collection management

3. **EY Knowledge improvements**
   - Developing fee-for-service model for account-specific support, streamlined product & services portfolio, executing against automation initiatives

4. **Culture change**
   - Double digit growth in culture KPIs: knowledge exchange, goal setting, expectations, role modelling

5. **Digital publishing strategy**
   - Global Editorial Board has been formed to evolve our global content strategy
Discover suite
- 194k visitors last quarter
- 69% of EY visited the Discover suite in Q4
- 114k monthly visitors

Discover search and content
Search of our global collection
- 164k visitors in Q4
- 59% of EY visited search in Q4
- 100k monthly visitors
- 37% of EY is visiting search monthly
- 2.6m monthly content views
- 1,647 monthly submissions
- 141k content pieces available

Discover people
Profiles and expertise location
- 22,439 profile updates in Q4
- 8% of EY updated their profile in Q4
- 34,696 complete profiles
- 13% of EY has a complete profile
- 72,463 monthly visitors
- 26% of EY are visiting profiles monthly
- 424,783 monthly profile views

Discover sites
Curated collections for SL, sector and topics
- 82k visitors in Q4
- 30% of EY visited sites in Q4
- 39k monthly visitors
- 14% of EY visiting sites monthly
- 338k monthly page views in Q4
**EY Knowledge culture**

### Knowledge culture KPIs

#### Knowledge exchange
- **Search**
  - Change: 60% (↑ 11%)
- **Contribute**
  - Change: 16% (↑ 2%)

#### Goal setting
- **Goal plan**
  - Change: 44% (↑ 11%)
- **Learning**
  - Change: n/a

#### Expectation
- **Awareness**
  - Change: 91% (↑ 11%)
- **Attitude**
  - Change: 73% (↑ 44%)

#### Role modelling
- **Behavior**
  - Change: 62% (↑ 25%)
- **Recognition**
  - Change: 37% (↓ 6%)

**YoY change FY17 Q2 to FY18 Q2**

### Business impact KPIs

#### Leadership engagement
- 64 percent report leadership reinforces the importance of knowledge sharing (31 point increase YoY)

#### Knowledge seeking and sharing
- 91 percent of people use the Discover suite every quarter
- 88 percent of our people say the quality of content in Discover is Good or Very good
- 2.4 million pieces of content are accessed on Discover search monthly, with pursuit materials and client service documents among the most accessed
- Over 85 percent say content is easy to find in Discover search, people and sites
- 75 percent of GCSPs indicate they have the resources, tools, and content they need to deliver client service

#### Time to deliver
- 9 out of 10 practitioners (93 percent) save time using knowledge content, tools and resources
- One quarter (24 percent) save over 10 hours per month
EY Knowledge Advisory communities

Reducing complexity, enabling global strategy

From 2012 to 2018 we moved from 100+ communities to 10

Aligned our Community Management strategy to support the build out and growth of the global Advisory practice
EY Knowledge Advisory communities

Engaging stakeholders, communicating purpose

- Engage stakeholders regularly
  - CS = domain leaders
  - CM = ops leaders
  - Advisory Knowledge Champions

- Leverage cross functional synergies
  - EYK Communities
  - Brand, Marketing and Communications
  - Business Development
  - Talent & Learning

- Align to and empower your strategy
  - AdvisoryCONNECTED
  - Connectivity and responsiveness
  - Solutions development and deployment
  - Growth drivers alignment

### Synergies with

<table>
<thead>
<tr>
<th>Community Sponsors</th>
<th>Monthly calls</th>
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<tr>
<td>Community Managers</td>
<td>Weekly calls</td>
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<tr>
<td>Community Advisors</td>
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<td>Content Owner</td>
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<td>Content Advisors</td>
<td>Quartely calls</td>
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**Teaming & Synergies**

- Over 200 Alumni, stakeholders regularly engaged with 60% turnover

**Highlights**

- Launch of Strategy & Customer and PAS Communities
- Americas Cyber site move from Digital site to Cyber Community
- Technology community site map reset
- Yammer groups consolidation, bulk upload for RA, Cyber e S&C resulting into 90% members increase

**Communication & Governance**

- Communication
  - 2 featured articles in KC-KNOW newsletter
  - 43 ACTION/ALERT/CELEBRATION emails

- Duplicates Management
  - Duplicates review across all domains
  - Decommissioning plan for 100 duplicate sites

- Acquisition Monitoring
  - Educating site owners on submitting content on EY Share in light of Discover
  - GAC endorsement

**Metrics**

<table>
<thead>
<tr>
<th>CS / CM Yammer Posts</th>
<th>Sites &amp; Yammer Δ %</th>
<th>Q1/Q2 FY18</th>
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</thead>
<tbody>
<tr>
<td>CS</td>
<td>Sites &amp; Yammer Δ %</td>
<td>Visits + 1,3%</td>
</tr>
<tr>
<td>CM</td>
<td></td>
<td>Yammer bulk upload membership campaign + 50%</td>
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**Synergy Programs**

- BMC Team - Monitoring global BMC pipeline for relevant GAC links inclusion in DNA articles
- Advisory Knowledge Champions - Enrolled to relevant Yammer groups
- Advisory Learning Team - ALP integration, learning modules promotion via Yammer

- Overall Penetration - 1%
- Yammer Collaboration members: +24% unique posters +12% posts +87% replies +62%
Communities penetration
2859 visitors in Q4 i.e. 11% penetration vs 30K target audience and overall FY18 cumulative penetration of 25%

*Penetration = ratio of actual visitors to headcount of relevant Advisory domains; cumulative FY18 target is 30%.

Yammer Collaboration*
- 53,342 members ▲ 13% - 89%
- 708 unique posters ▲ 22% - 99%
- 1325 posts ▲ 18% - 139%
- 575 replies ▲ 2% - 136%

*All Advisory domains endorsed groups
% increase Q4/Q3 - FY18/FY17

Highlights
- Yammer Bulk Upload for Program Management and Risk Transformation
- Improving Yammer activation with PAS, BPM, BMC Learning, Editor’s choice
- RA, IA, Cyber and PM Community Sponsors active on Yammer
- 170 decommissioned sites

Challenges
- Duplicate communities consolidation / decommissioning
- CM appointment for Cyber
- Community Sponsors engagement on Yammer: S&C, Finance, IT, SC&O are not active at all

Celebrations, Rewards and Recognition
- Celebrations
  - 1 year anniversary for IA, Cyber, PM and SC&O
- Best Community Sponsor
  - Paul van Kessel for celebrating 1 year anniversary through multiple channels (Yammer post)
  - Esi Akinosho best Yammer poster
- Best Community Managers
  - Sukhdeep Wasu & Hakima Tou for one year birthday celebration of Cybersecurity
  - Becky Deacon best Yammer poster
Advisory Community Managers
Inside their mind

- **Business skills**
  - Project Management
  - Collaboration vision
  - People management
  - Stakeholder management
  - Community advocacy & promotion
  - Training development & delivery
  - 20%

- **Strategic skills**
  - Business needs analysis
  - Roadmap development
  - Member guidelines development
  - Measurement & reporting
  - Trendspotting & regional integration
  - Consultation
  - Leadership coaching
  - Evaluating engagement techniques
  - 20%

- **Content skills**
  - Content strategy development including ongoing content management, review and promotion to global systems for reuse
  - Content curation
  - Taxonomy & tagging management
  - Communication planning
  - Writing
  - Findability or internal Search Optimization
  - 25%

- **Technical skills**
  - Basic SharePoint functionality such as: in page editing, data and file upload and member management
  - Basic usability techniques, design and site structure
  - Yammer functionality and navigation
  - 10%

- **Engagement skills**
  - Listening & analyzing
  - Response & escalation
  - Promoting productive behaviors
  - Empathy & member Support
  - Facilitating connections
  - New member welcoming
  - Member advocacy
  - 25%

**Required skills of an EY Community Manager**
(and weight of importance)
The «community» way

KM is dead vs *KM is the foundation of our social collaboration*

- Traditional KM gets revamped through communities and KM platform and processes are the foundation of any social collaboration
- People focus on what they need, follow urgency, are opportunistic and as a result much more positive about the outcomes

Metrics

- 70% of our people are active on Discover search
- Global Knowledge Survey participation is steadily improving
- 2,4 millions knowledge objects accessed every month
The «community» way

Be like Google vs **we are EY “Google”**!

- Successful searches show alignment with business priorities
- Unsuccessful searches help identify content gaps or educate people
- People gain time to market, to proficiency and to qualitative delivery
- Communities play a key role in content harvesting leveraging the whole network

**Metrics**

- 100k monthly visitors
- 1650 knowledge objects collected every month
- 141k knowledge objects available

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A focus on value in global IA pricing

The increasingly rapid pace of technological change in...
The «community» way
Push it vs pull it

- Discover Sites and communities content curation aligned with global strategy
- Discover search profile applies selected filters
- Discover Digest subscription allows each individual to select what, how, when to get updates

Metrics
- 39k monthly visitors
- 14% monthly penetration
- 30% quarterly penetration
We need our own vs we join you

- We moved from 100 to 10 global communities
- Where, what, how drives parallel and duplicate initiatives
- Turn challenge into opportunity, show pros of going global and leverage technology changes to consolidate

**Metrics**

- From 100 to 10 global communities
- 25% yearly penetration
- 60% stakeholders rotation and 200 Alumni
The «community» way

Bigger is better vs together is more democratic

- Not everybody lives in a well developed market or practice
- Easy, on demand, synchronous connectivity empowers smaller practices to leverage the mindset, strategy, skills and resources of 250k
- Local ideas and services emerge and communities support globalization

Metrics

Biggest Yammer group after MS
190k members in All company group
50+ global solutions deployed globally
The «community» way
Someone else will do it vs this is part of our culture

• Leaders coaching at showing up and branding themselves
• Sponsors’ profiles and posts on communities metrics and Yammer metrics
• ‘Knowledge at EY’, a day one knowledge culture for 60,000 new joiners/year

Metrics

- 35K completed profiles
- 13% of EY has a complete profile
- 24% are visiting profiles monthly
The «community» way
I don't have time *vs communities as a learning playground*

- Strong integration of communities with learning platforms i.e. ALP (Advisory Learning Portal), EY Academy, EY Badges
- Communities participation and collaboration represents informal learning supported by formal platforms and processes

**Metrics**
- 250 Cyber learning modules
- 500 Analytics learning modules
- 24 Technology EY Badges
The «community» way
Social is frivolous vs social is accountable

- Accountability is clear, everybody is visible, the community is the meeting points of all initiatives across functions i.e. RACI
- Trust goes up, conflicts go down
- Communities are considered as initiatives activators and strategy execution accelerators

| Metrics | 15 (sub)functions involved | 24 communications work streams | 10 communication plans in place |
The «community» way

Incentives don't work vs making a career

- Community Managers cover strategic operations roles
- Celebrations, participation, visibility, opportunity to build a network and a career, Community Managers promotions
- Reward and recognition increase and inform appraisal processes

**Metrics**

- 54k members on Yammer
- 139% yearly increase in posts
- 136% yearly increase in replies
The complexity and agility of our digital world requires the adoption and embedment of social practices into traditional KM processes.

Knowledge Management is the foundation of social collaboration, there is no success nor sustainability unless the two work together.

Knowledge Management processes, platforms and roles are revamped by community implementation and social behaviors.

Social behaviors are difficult to instill but once embedded in operations grow organically.

Social behaviors get channeled and harmonized through community management initiatives.

Community Management is a powerful way to bring people together and accelerate continuous learning and strategy execution.

Conclusions