



IQPC Conference Master Class

Evaluating and Applying

Effective Change Management Strategies

to Roll-Out KM

From managing data – to managing knowledge



Presented by Bob Angel, The Gilford Group Limited
May 30, 2003

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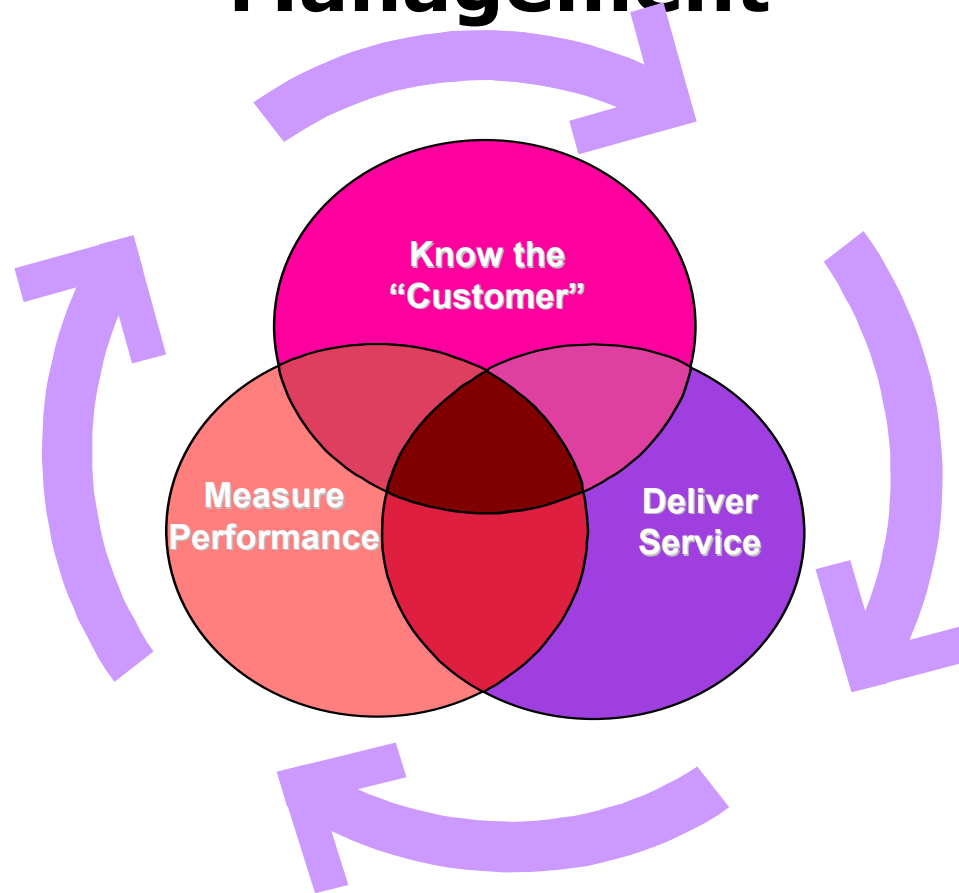
The New Economy – 21st Century

The War for Knowledge



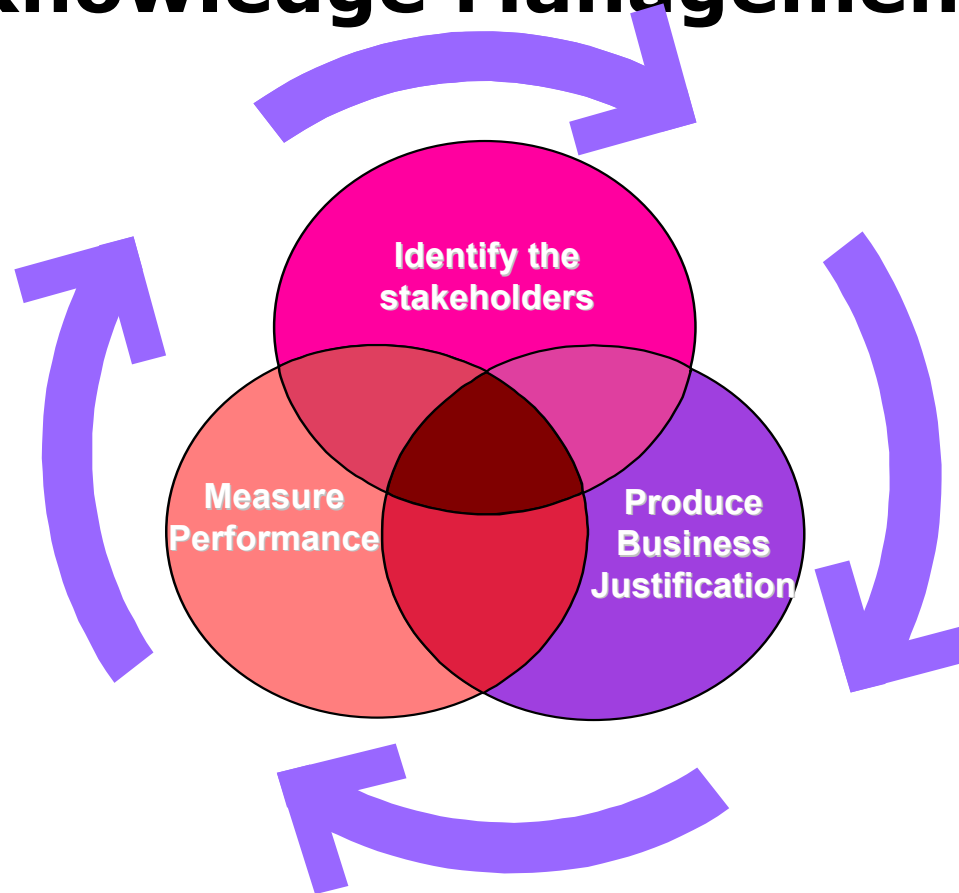
- Flexible response
- Rapid deployment
- Precision weapons
- Massive firepower
- New technology
- Hearts and minds
- Low casualties
- Targeted clusters
- Time to market
- Individual consumers
- Pricing initiatives
- Product development
- Wallet share
- “Customer” retention

Customer View of Knowledge Management



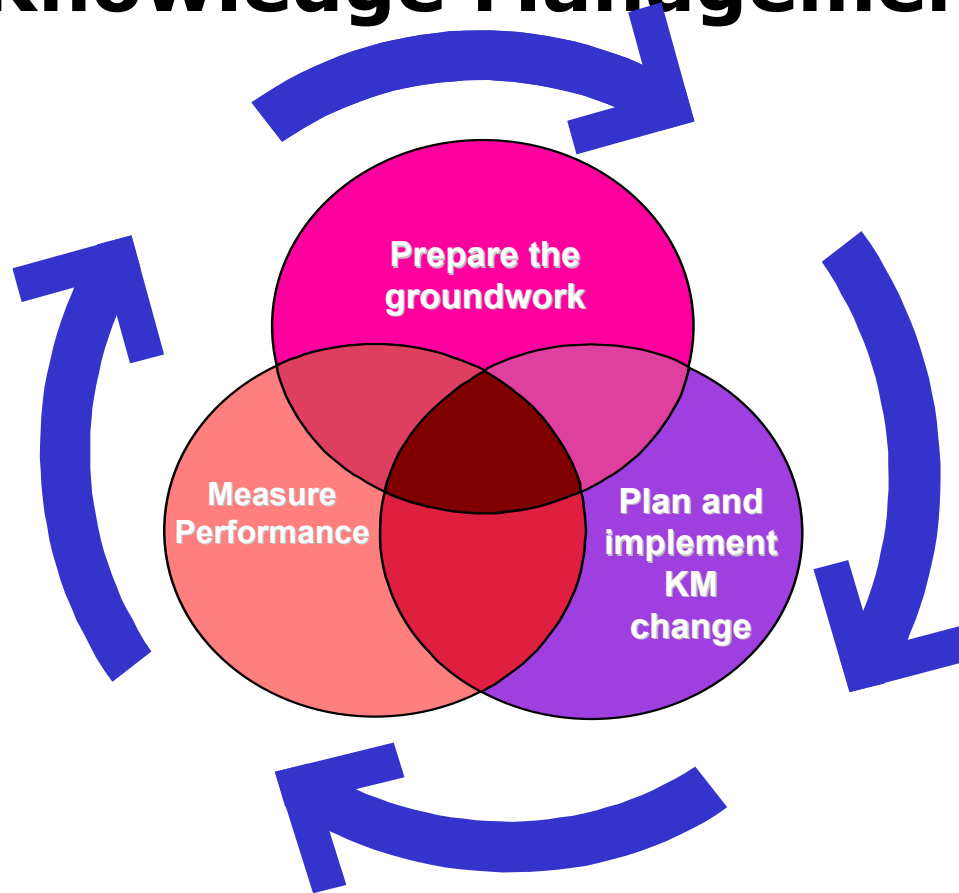
- How to understand the “customer” community as individuals?
- Are you reinforcing your brand strategies?
- What are the benchmark against best-in-class (gap analysis)?

Enterprise View of Knowledge Management



- Do you need to be a “Sense & Respond” organization?
- Who are the stakeholders in KM?
- How to integrate supply chain, production, distribution knowledge?

Implementation View of Knowledge Management



- How should internal vs. external KM dimensions be differentiated?
- How do you accomplish the cultural changes needed?
- How do you know when your KM change is successful?

Defining Knowledge

- 1. Explicit knowledge:** Includes assets such as patents, trademarks, copyrights, business plans, and marketing research (includes anything that can be documented, archived and codified)
- 2. Tacit knowledge:** The know-how (or information that constitutes knowledge) residing in the 'minds' of people - information technology can help facilitate the channeling of tacit knowledge through e-mail, instant messaging, groupware, and collaborative technologies
- 3. Structural knowledge:** processes, strategies and tactics (that remain when the employees go home at night)

Bridging the Culture Gap



- **Not having a specific business goal**
- **Allowing technology not business needs to dictate KM**
- **Regarding all information as Knowledge**
- **No template for recognizing universal knowledge**
- **Static knowledge may have limited shelf life**
- **Distinguishing what is context and value**
- **Getting employees and management on board**
- **Not making organizational change enable “winning conditions”**

What are the Characteristics of the CKO?

- “collaboration is one of the key elements in knowledge management”
- “previous direct experience ramping up and/or fixing a dysfunctional global knowledge management delivery unit or organization inside a Fortune 1000 corporation”
- “cultural leadership is essential, and strong skills in relationship building”
- “applicants for those positions must have a much broader view of the business along with a solid background in the enabling technology”
- “focusing on effective knowledge sharing”
- “we have 53 state offices, we don't want 53 silos yet we also don't want a cookie cutter approach because each state has some unique issues”
- “the best person for a CKO position is someone who is familiar with the organization, well connected, and most important, very trusted”

The Knowledge Manager's Job

Commercial knowledge is performative, not declarative - documents are only artifacts of performances

- Identify the pressure points where knowledge really produces economic value
- Find the best performers within the communities represented by those pressure points
- Turn their performances into one or more recipes
- Scale those recipe-based performances
- Measure to characterize the economic benefit
- Incent employees for KM performance
 - Small number of people → individual value proposition
 - Large group → value proposition by employee type

Marc Demarest, Noumenal Inc.

The Knowledge Management Context

Knowledge Base and customer relationship management (CRM) systems allow all employees to have access to relevant information within an organization. A knowledgebase allows your organization to control the internal knowledge that your employees use in their daily activities.

Every organization has potential knowledge, explicit knowledge and tacit knowledge. Potential knowledge lives in all of the data that an organization generates or gathers. To become knowledge, **it must be extracted, analyzed, understood and then finally summarized and passed along** to all potential users. If potential knowledge is not transformed into real knowledge and shared, it is of very little use to an organization. Even real knowledge has limited impact on the performance of an organization unless there is an intuitive and efficient way to share the information.

Explicit knowledge is fully and clearly understood, **but very few individuals have access to it**. Knowledge that resides on employee hard drives, unknown locations on networks, e-mail and file folders has **limited impact as well if there is no system in place to alert others** in the organization of this particular body of knowledge. A good system will also facilitate the quick and intuitive sharing of this corporate knowledge.

Most of the knowledge in an organization is tacit knowledge, and many times this knowledge is the most important knowledge within the organization. Tacit knowledge resides in people's heads.

Gilford's Roadmap Approach to Evaluating KM Strategy

- Define existing culture
- Identify strengths and weaknesses
- Measure impact on values and products
- Analyze and assess electronic information systems
- Analyze and assess other information systems
- Identify gaps in existing systems
- Build the KM business case



Corporate Performance Management

Performance only improves when
people do things differently

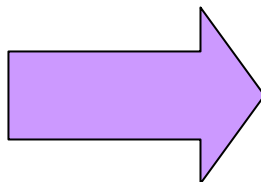
Peter Murray, Cranfield Business School

“Traditional, vertically integrated businesses had better retool if they want to survive. Why? Because loosely organized process networks, an altogether different form of business entity, are using new collaboration and interaction technologies to minimize the obstacles of doing business across corporate boundaries. Corporate performance management (CPM) will enable businesses to respond to the new mode of competition by allowing them to maintain their center of control while adding the change-driving engines of **decentralization**.”

Aberdeen Group, *Corporate Agility Strikes Back*, March 2003

Executives: from Metrics to Value Metrics

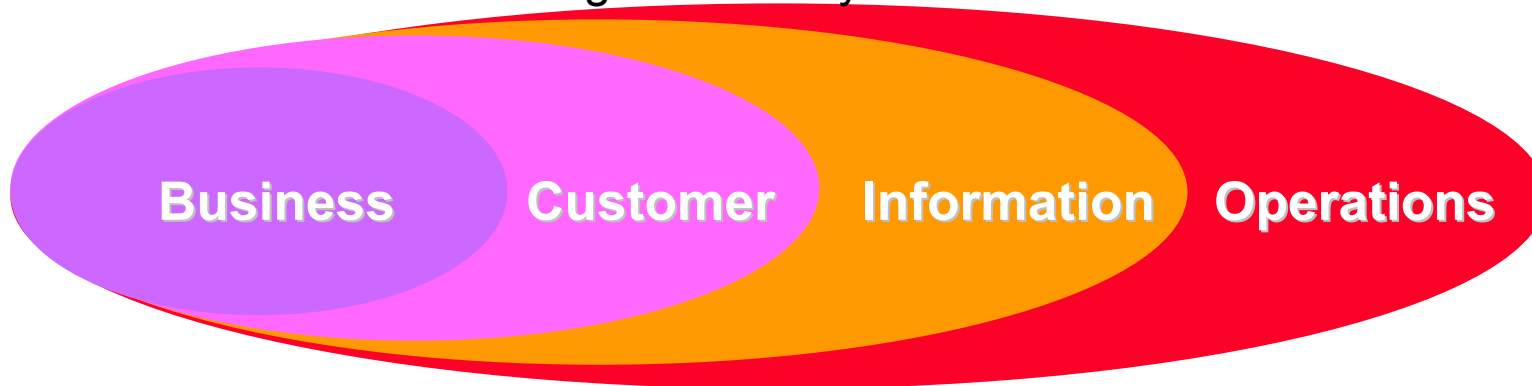
- Revenue increases
- Costs and cost reductions
- Incremental profit
- Cash flow changes



- “Customer” lifetime value
- Channel effectiveness
- Relationship cost/benefit
- Time to market
- Profitable growth
- Pricing power/share of wallet
- Measurable ROI
- Etc.

Gilford Typical Workshop Topics

Knowledge Discovery Dimensions



- Knowledge Plan and KM strategy
- Who are the customers, understanding them as individuals
- Retention, loyalty, and service strategies
- Roles of Business (in client lifecycle)
- What is Best in Class?
- Existing vision, roadmap, and business case
- Business rules

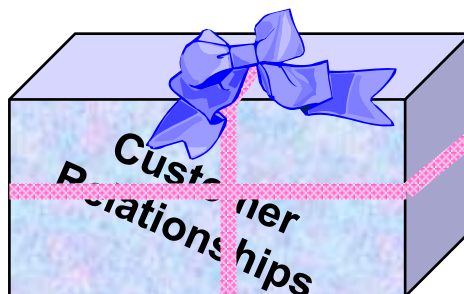
Typical Gilford Workshop Deliverables



- Project team
- Business Requirements
- Pilot success criteria defined
- Assessment of people, process, technology, and information needs

Workshop Goals: Start cultural change, align Knowledge Plan, identify change agents

Seeking KM Business Benefits



- Identify gaps, priorities, risks, sensitivities
- Introduce external expertise and knowledge transfer
- Focus on value proposition and payback
- Set groundwork for self funded KM
- Create business rules environment

Injecting a Sense of Urgency

Based on my own comparisons of the administration of leading American and British companies, I believe that the greater management effectiveness achieved by leading American companies is due chiefly to the greater sense of **competitive urgency** that pervades our most successful businesses. Certainly, **management technique is less important than competitive urgency**. Even the most advanced management methods will not be fully effective unless these techniques are adopted and administered with a real sense of competitive urgency.

“Company Philosophy, the way we do things around here”, Marvin Bower, The McKinsey Quarterly 2003 No 2

Project Management Risk

- CRM executive satisfaction rate >70%
 - Focus on customer experience not technology
 - 25% of those dissatisfied cite application usability
- Problems:
 - 46% say process change
 - 34% back end integration
 - 33% software cost
 - 23% end user adoption
 - 14% technology selection



Forresters Research, February 2003



Gilford CRM Best in Class Criteria



Strategic

Operational

Tactical

Best in Class examples

Thank You



Book Early
and **SAVE!**
See page 8



BEST PRACTICES IN KNOWLEDGE MANAGEMENT

Successfully Transform your Human Capital and Information into Tangible Competitive Advantage

Two-Day Conference: May 28-29, 2003

Pre and Post Conference Master Classes: **May 27 & 30, 2003**
The Old Mill Inn — Toronto, ON

Special Keynote Presentations From:



Ash Sooknanan

The Evolving
Role of KM

**WSIB KM
Award Winner**



Dr. Nick Bontis

Plan, Implement & Measure
KM: Groundbreaking Case
Study Recently Completed
at Health Canada



Hubert Saint-Onge

New KM techniques for a
Sharing Culture

Professional Facilitator – Lead KM Panel



Bob Angel

THE GILFORD GROUP
Participate in four highly
interactive debriefings

Work Through Hands-on Exercises
at our Interactive Master Classes

A Develop Critical Tools and
Frameworks

B Effective Change Management
Strategies for KM

C Verify and Measure your KM

Walk Away with Practical Tools & Best Practices:

- ✓ **Archive Your KM ROI**
BANK OF MONTREAL
- ✓ **Prepare for the Impact of the
Changing Workforce**
STATISTICS CANADA
- ✓ **Leadership Development
Through Succession Planning**
DOFASCO
- ✓ **Identify Enterprise-Wide
Stakeholders**
HILL & KNOWLTON
- ✓ **Retain Knowledge
During Internal Change**
TORONTO REHABILITATION
INSTITUTE
- ✓ **Gain Senior Management Buy-In**
PRIME RESTAURANTS OF CANADA
- ✓ **Create a Tailored KM Framework**
CANADIAN SCHOOL OF
MANAGEMENT
- ✓ **Gain a Competitive Advantage**
MCGILL UNIVERSITY
- ✓ **Allocate and Define KM Costs**
PAST PRESIDENT, CCHRA
- ✓ **Apply the Right I.T. Tools**
ONTARIO MINISTRY OF
TRAINING, COLLEGES &
UNIVERSITIES
- ✓ **Build a Corporate University**
ROCCO FORTE HOTELS
- ✓ **Refine Your KM Strategy**
PUBLIC WORKS &
GOVERNMENT SERVICES



The first 25 delegates registered for Knowledge Management
will receive a **FREE COPY** of "The Human Capital Edge"!

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Maximizing the Potential of KM: Taking your KM Plan from Inception to Completion

With the explosive interest in Knowledge Management in recent years, there have been a number of approaches and views to developing a KM framework. It is in the successful and failed practices where you learn to build or recreate your own KM framework.

This workshop will help you:

- **Organize the different methods, practices and technologies**
- **Classify tools to different phases in your KM program including:**
 - Strategy
 - Development
 - Implementation
 - Measurement
- **Identify stakeholders & define responsibilities for:**
 - I.T. Staff
 - Human Resources
 - Communications
 - Knowledge Management
 - Senior Executives
- **Examine knowledge transfer in your organization:**
 - Identify the gaps in communication
 - Explore possibilities to increase knowledge sharing
 - Strategies for increasing communication

- **Create a solid framework:**
 - Review potential frameworks which could work for you
 - Identify current knowledge management practices you may have and how they tie in
 - Determine, based on various criteria, which framework will work best for your organization
- **Best practices in integrating new and existing KM practices**
- **Test your KM framework:**
 - Determine whether or not your current framework is optimal
 - Briefly examine some key performance indicators

About Your Workshop Leaders

Dr. Eric Sandelands, is President & Dean of Toronto-based private management school the **CANADIAN SCHOOL OF MANAGEMENT**, Vice Principal of International Management Centres Association (IMCA), and a Professor of the University of Action Learning at Boulder (UALB). He is Chair of the newly formed Canadian Corporate Business School Forum.

Dr. Sandelands designs and leads organizational learning interventions, primarily with European and North American clients. North American clients include: Loblaw's Companies (retail), Marriott

(hotels), Sodexho (food services and facility management) and Kaiser Permanente (healthcare).

Sandelands is co-author and co-editor of the following books: Transforming Performance through a Learning Organization Strategy, The Virtual University, The Virtual Learning Organization. He is an occasional contributor to the Journal of Knowledge Management.



Dr. Chandana Jayawardena is currently the Accreditation Advisor for **ROCCO FORTE HOTELS** and is the Vice President & Partner of the Canadian School of Management, International Vice President of the International Management Centres Association (IMCA) Socrates Ltd, Oxford, UK, Professor in Marketing of the University of Action Learning, Colorado, USA and Senior Lecturer in Tourism Management of the University of the West Indies (UWI), Jamaica. Jayawardena has gained a wide range of experiences in 77 organizations in 16 countries. This includes 49 hotels managed by Le Meridien, Forte, Oberoi, Hyatt, Inter Continental, Holiday Inn, Hilton, Savoy, Taj, Sheraton, Regent, SuperClubs, Rocco Forte Hotels and smaller hotel companies and 18 educational institutions.

DAY ONE WEDNESDAY, MAY 28, 2003 • MAIN CONFERENCE SESSIONS**8:00 Registration & Continental Breakfast****8:30 Opening Address by Chairperson**

Douglas Weidner is the Director of the Knowledge & Innovation Management Professional Society (KMPro) Certified Knowledge Manager (CKM) Program. He is the former Chief Knowledge Engineer and Senior Technical Fellow for \$25B Northrop Grumman. Involved in KM since 1994, Douglas has grown a solid, worldwide reputation as a dynamic and influential speaker, instructor and author.

Douglas Weidner
Director
KMPRO

**8:45 Understanding the Impact of the Changing Workforce on How you Run your Business**

Canadian corporations face the risk of a significant shortage of workers over the next 5-10 years. Baby boomers now make up half of the labour force, and one fifth of them will be over the age of 60 by 2011. At the same time, there are fewer young people to replace them in the labour market. This has significant implications for Knowledge Management. Organizations are viewing the loss of key personnel as the main reason for implementing more KM practices. This presentation will look at:

- The changing profile of Canada's workforce
- Current labour trends and future job gaps
- Industries challenged: Job functions within specific industries which will be most affected

Deborah Sunter
Director of Labour Statistics
STATISTICS CANADA

AN UPDATE ON THE STATE OF THE WORKFORCE**9:10 Is KM Dying?: The Evolving Role of Knowledge Management Across Organizations**

One of Canada's foremost KM authorities will be discussing the evolution of KM and its changing role. Ash Sooknanan, the first and only Canadian honored, was one of six 2001 "KM's Most Influential People" by Knowledge

Management Magazine. He will be giving insights and discuss:

- The evolution of KM
- Insights into some significant KM success stories in both private and public sector organizations
- Diversifying functions within your KM department
- What's next: Determining how KM's priorities will evolve in the future

Ash Sooknanan
Senior Manager, Enterprise Content Management
BMO FINANCIAL

**9:55 Networking Refreshment Break****10:10 Gaining Senior Management Buy-In: Clearly Demonstrating the Bottom Line Benefits of Intellectual Capital**

As with any corporate investment, senior management requires solid numbers to act. Prime Restaurants, with approximately 140 Canadian locations and system-wide annual sales of over \$300 million will discuss the importance of and build the business case for Intellectual Capital.

- Identifying and utilizing corporate champions
- Articulating the value propositions for knowledge-sharing to senior management to gain support from all levels
- Aligning your knowledge strategy with your business strategy
- Demonstrating the value of knowledge investments and knowledge programs by utilizing:
 - First level measures: Knowledge usage and contribution
 - Second level measures: User surveys
 - Third level measures: KM's contribution to the Balanced Scorecard
 - Reward & recognition programs
 - Tying knowledge-sharing to performance evaluation
 - Internal marketing programs
 - Success stories
 - Showing competitive advantage

CASE STUDY

Pauline Holman
Vice President, Human Resources and Organizational Development
PRIME RESTAURANTS OF CANADA

10:55 Taking your KM Program from Start to Finish: Planning, Implementing and Measuring KM at Health Canada

Professor Nick Bontis will describe the results of a groundbreaking KM case study recently completed at Health Canada. You will learn how Health Canada's KM framework was planned, implemented and measured. Take this opportunity to ask Nick all of your difficult questions related to KM strategy, methodology and action. You will walk away from this session with insights into:

- Determining the relationships between HR, IT, KM, leadership and performance
- How you can use a KM map for senior management as a tool for strategic budgeting and planning exercises
- Establishing a realistic time-line that allows managers to position, plan and implement a KM initiative

Dr. Nick Bontis is recognized by the Editor of Harvard Business Review as "a pioneer and one of the real experts in Intellectual Capital."
McMASTER UNIVERSITY

**KEYNOTE PRESENTATION
CASE STUDY**

11:40 MORNING DE-BRIEF: Discussing Lessons Learned & What Practical Suggestions Executives can take back to their Organizations

Take this unique opportunity to openly discuss and debate the issues discussed over the course of the morning.

- Hear the perspectives of each of the speakers on what they feel is the top lesson they have learned
- Ask specific questions of the morning speakers
- Share your own opinions concerning some of the issues raised

Facilitator:

Bob Angel, THE GILFORD GROUP

INTERACTIVE SESSION

Panel:

- Deborah Sunter, STATISTICS CANADA
- Pauline Holman, PRIME RESTAURANT GROUP INC.
- Dr. Nick Bontis, McMASTER UNIVERSITY

12:10 Luncheon for Delegates and Speakers

1:15 Developing a Cohesive KM Strategy: Defining Enterprise-Wide Roles and Responsibilities

A Knowledge Management project must cover many areas of an enterprise in order to provide value to its employees. When starting a KM program, your organization must identify and engage those business leaders and stakeholders who will aid in customizing your KM methodology. With 71 offices in 37 countries, Hill & Knowlton must ensure that knowledge is transferred efficiently and effectively to retain a competitive edge in the public relations industry. This presentation will discuss:

- How to identify the stakeholders within your company
- Allocating decision-making and responsibilities to the most suitable department or employee
- Benefits and costs encountered along the way to implementation at Hill & Knowlton
- Key lessons learned over the course of Hill & Knowlton's implementation

Ted Graham

**Worldwide Director of Knowledge Management
HILL & KNOWLTON**

CASE STUDY

2:00 Customizing your KM: Building a KM Framework Tailored to your Organization's Needs

Knowledge Management is an integration of several different disciplines and endeavours. Identifying the practices you need to build a KM framework will help you guide the successes of your KM strategy. In order to develop an effective framework, you need to assess methods, practices and technologies that are available and determine the ones that are important to your organization. This presentation will discuss:

- Recognizing existing knowledge practices
- Developing a clear methodology to move forward
- How you can standardize your KM practices to create a solid framework

**Eric Sandelands
President and Dean
CANADIAN SCHOOL OF MANAGEMENT**

CRITICAL TOOLS AND FRAMEWORKS

2:45 Networking and Refreshment Break

3:00 Transferring and Translating Knowledge into a Tangible Product for Competitive Advantage

To remain competitive, organizations must efficiently and effectively create, locate, capture, and share their organization's knowledge and expertise. That critical knowledge plays a key role in decision-making during times of

business strain or opportunities. This presentation will take a look at how you can turn knowledge into a competitive asset.

- Strategies for acquiring both internal and external competitive knowledge
- How to apply your knowledge more effectively towards innovation, marketing and product quality

**Karl J. Moore
Faculty of Management, Marketing and Strategy
McGILL UNIVERSITY**

**GAIN A COMPETITIVE ADVANTAGE
CASE STUDY**

3:45 Determining How you Will Allocate your Costs

The expenditures for a Knowledge Management program can be quite significant and as a result, decisions have to be made as to how the money will be allocated. Costs can mount depending on the type of initiatives you want to put in place and whether or not your organization decides to outsource or in-source your KM initiatives. This presentation will take a look at:

- Planning a budget
- Evaluating the costs and benefits of outsourcing vs. in-sourcing
- Determining where your dollars should be distributed to maximize their value
- Insuring money is going to proper departments

Ian Turnbull

President

LAIRD & GREER MANAGEMENT CONSULTANTS

Past President of CANADIAN COUNCIL OF HUMAN RESOURCE ASSOCIATION

CLEARLY DEFINING YOUR COSTS

4:30 AFTERNOON DE-BRIEF: Discussing Lessons Learned & What Practical Suggestions Executives can take back to their Organizations

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Facilitator:

Bob Angel, THE GILFORD GROUP

Panel:

- Ted Graham, HILL & KNOWLTON
- Eric Sandelands, CANADIAN SCHOOL OF MANAGEMENT
- Ian Turnbull, LAIRD & GREER MANAGEMENT CONSULTANTS

INTERACTIVE SESSION

4:50 Conclusion of Day One

DAY TWO

THURSDAY MAY 29, 2003

8:30 Opening Address by Chairperson

**Douglas Weidner
Director
KMPRO**

8:45 Facilitating the Cultural Shift: Transforming Departments to Improve Knowledge-Sharing Communities

Developing a KM culture where sharing is widely appreciated to be in everybody's "best interests" is a significant challenge. In this keynote presentation, Hubert Saint-Onge will speak about leveraging communities of practice: leadership and organizational change. He will discuss how to find and share best practices within an organization as well as develop and improve knowledge departments with the help of community activities.

- How can we humanize the KM process?
- Strategies for promoting employee sharing
- Understanding the cultural shift needed to create Communities of Practice
- Building an organization that promotes both performance and development

**Hubert Saint-Onge is the
Former Senior Vice President
Strategic Capabilities for CLARICA
and President of convergeandknow**

CREATING A SHARING CULTURE

9:30 Developing your Company's Future Leaders Through Optimal Succession Planning Strategies

A dwindling talent pool may be the biggest threat to your company's future. When a leader leaves an organization, they leave a gap that is difficult to fill. Are you positioned to ensure that key roles and their embedded knowledge are filled by capable talent? Dofasco, one of Canada's 50 best companies to work for, will share its approach to leadership succession and development.

Spending more than \$15 million a year to further develop and enhance the skills of their 7,200 employees, Dofasco has one of the most innovative, productive and empowered workforces in North America. Jim Hill, Dofasco's Manager of Performance Management will discuss:

- Dofasco's performance management philosophy: How it has resulted in their success
- How to develop a system that allows your employees to add value
- Succession vs. replacement planning: Determining what approach is right for you
- Learn from Dofasco's *Engage* leadership development approaches: How your organization could benefit from a similar program

Jim Hill
Management Resource Planning
DOFASCO

**BUILDING STRONG LEADERS
CASE STUDY**

10:15 Networking and Refreshment Break

10:35 The Information Management Side of KM: Applying the Right I.T. Tools to Maximize Knowledge Accessibility

With the ever-increasing pool of available KM solutions it is increasingly difficult to assess the best tools for your organization. I.T. can be a critical component in the launch of a successful KM strategy. This presentation will look at:

- The Ministry of Education and Ministry of Training, Colleges and Universities KM Strategy
- KM Objectives – Developing short-to-medium term goals for your strategy
- Areas "touched" by I.T.
- Understanding what I.T. can and cannot do to enhance KM
- Avoiding potential pitfalls
 - Attempting to solve non-I.T. problems with I.T. solutions
 - Anticipating required culture changes
 - Providing real and costly solutions to non-existent problems
 - Evaluating the buy – in-house or outsource I.T. dilemma
 - Information management requirements – Library Science

Greg Turko
Manager, Knowledge Management Project,
ONTARIO MINISTRY OF EDUCATION, ONTARIO MINISTRY
OF TRAINING, COLLEGES AND UNIVERSITIES

CASE STUDY

11:20 MORNING DE-BRIEF: Discussing Lessons Learned & What Practical Suggestions Executives can take back to their Organizations

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Bob Angel, THE GILFORD GROUP

Panel:

- Hubert Saint-Onge, konvergeandknow
- Jim Hill, DOFASCO
- Greg Turko, ONTARIO MINISTRY OF EDUCATION,
ONTARIO MINISTRY OF TRAINING, COLLEGES AND UNIVERSITIES

INTERACTIVE SESSION

11:50 Luncheon for Delegates and Speakers

1:00 Evaluating the Costs and Benefits of a Corporate University as your KM Vehicle

Companies are increasingly recognizing that a corporate university will elevate training, education, and employee development, which will result in organizational growth, innovation, productivity and profitability. This presentation will discuss:

- Creating and applying a model that best suits your business needs
- Capitalizing on best practices in corporate university design
- Identifying key milestones and downfalls in the development of a corporate university
- Planning on a small or large budget

Dr. Chandana Jayawardena
Accreditation Adviser
ROCCO FORTE HOTELS

CASE STUDY

1:45 Retaining your Critical Knowledge in Times of Internal Change

Mergers and acquisitions (M&A) are part of the daily business news. In 2002, there were 855 M&A transactions in Canada, totaling \$91 billion. KM clearly has a function in making those mergers successful, from knowledge mapping and expertise to bridging data and information architectures. The Toronto Rehabilitation Institute will discuss their own KM strategies for their amalgamation of 3 organizations creating a hospital with 5 locations and 6 service programs. This presentation will discuss:

- How to deal with budget cuts, mergers and acquisitions
- Managing new intellectual assets
- Knowledge integration
- How to ensure the quality of staff performance with a decreased or increased workforce

Margaret Yanicki
Training & Organizational Development Consultant
TORONTO REHABILITATION INSTITUTE

**MERGERS AND ACQUISITIONS
CASE STUDY**

Pat Howard
Director of Education & Organizational Effectiveness
BAYCREST CENTRE FOR GERIATRIC CARE

2:30 Networking and Refreshment Break

2:50 Continuous Improvement in KM: Learning from Successes and Failures to Refine your KM Initiatives

Many world-class companies have been managing knowledge for years, even though their processes or titles have not been labelled KM. In the same respect, these companies have also been learning and building on successes and learning from mistakes. This presentation will look at different ways of improving your KM initiatives:

- How to ensure you set credible targets for success
- Identifying problems and applying KM solutions to them
- Creating a KM maturity benchmark survey to assess processes, skills and competencies
- Defining success for your organization

Niall Sinclair
Director of Knowledge Management Initiatives
PUBLIC WORKS & GOVERNMENT SERVICES

**PERFORMANCE AUDIT
CASE STUDY**

3:35 ROI: Measuring the Value of your KM Strategies

Measuring your KM ROI is increasingly important but few organizations have developed and applied such procedures. Bank of Montreal, one of North America's largest financial services providers, with over US \$160 billion in assets and 32,000 employees will discuss how its value based management programs fit into its corporate strategy and provides a measurable return to its shareholders. You will learn how to:

- Connect your KM practices to your bottom line
- How you can directly apply and define metrics to measure your KM ROI
- Refine your KM strategies to maximize strategic outcome

Richard Livesley
Senior Manager of Knowledge Management
BANK OF MONTREAL

**CALCULATING RETURN ON INVESTMENT
CASE STUDY**

Cathy Daniels
Managing Director of Customer Knowledge Management
BANK OF MONTREAL

4:20 CONCLUDING DISCUSSIONS: Insights into the Future

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Bob Angel, THE GILFORD GROUP

Panel:

- Dr. Chandana Jayawardena, ROCCO FORTE HOTELS
- Margaret Yanicki, TORONTO REHABILITATION INSTITUTE
- Pat Howard, BAYCREST CENTRE FOR GERIATRIC CARE
- Niall Sinclair, PUBLIC WORKS & GOVERNMENT SERVICES
- Richard Livesley, BANK OF MONTREAL
- Cathy Daniels, BANK OF MONTREAL

INTERACTIVE SESSION

4:50 Conclusion of Day Two

B Post-Conference Half-Day Master Class • Friday, May 30, 2003 • 8:30am - 12:00pm

Evaluating and Applying Effective Change Management Strategies to Roll-Out KM

In these times of uncertainty and continual business change, organizations need to move fast just to keep up. **This includes making far-reaching improvements in how managed knowledge is to remain relevant to customers, stay ahead of the competition, and ensure you are positioned for the long haul.**

KM change strategies need to deal with such issues as:

- Increasing volumes of information across distributed organizations
- Access to knowledge from disparate electronic
- Less structured sources
- The business case for applying new knowledge
- Measuring the results of knowledge management changes.

This all may need to be done in the face of often serious cultural change obstacles.

How do market leaders deal with these changes quickly yet appropriately, in an increasingly competitive market?

In this interactive workshop, you will learn how to:

- Define your existing culture
- Identify your strengths and weaknesses
- Gain buy-in
- Announce and communicate change
- Measure the impact on your organization's values and products
- Analyze and assess your organization's systems
- Identify gaps in existing systems
- Relate KM to brand promise and customer satisfaction
- Gain agreement on business requirements
- Anticipate and deal with resistance: Tips & Tricks
- Measure the effectiveness of your change

This workshop will take you through the three stages of rolling out KM change: **preparing the groundwork, planning, and implementation.** Participants will gain practical pointers on how market leaders approach the roll-out of KM change, and what can be expected.



Bob Angel has built a solid reputation as a consultant in client relationships. He started **THE GILFORD GROUP** in Toronto in 1985, and has helped many substantial organizations put innovative customer service strategies into practice. Currently, he is working in retail banking and insurance. In recent years, he has acted as a subject matter expert for NCR's Teradata Division and its Teradata relational data base management system. This means thought-leadership analytical CRM, data mining, and modeling, especially state-of-the-art client communication optimization and client profitability measurement. Angel's recent articles have been published in the Canadian Banker, CA Magazine, and Canadian Marketing, as well as The Banker (UK), and Corporate Executive Board Council on Financial Competition (USA). He is a member of the Canadian Association of Management Consultants, and on the Board of The Strategic Leadership Forum (the Toronto Society for Strategic Management).

C Post-Conference Half-Day Master Class • Friday, May 30, 2003 • 1:00pm - 4:30pm

Implementing Performance Metrics: Developing, Verifying and Measuring The Successes & Failures of your KM Strategy

Once your KM program is in place, the next important step is to evaluate your practices and measure to see if they are working towards your company's overall goals. This critical phase is needed to find and repair failed strategies as well as build and grow on successes. **This interactive session will help you get the tools needed to create metrics to measure the success of your KM strategies.** This workshop will help you:

- Develop metrics for your KM program
- Implement strategies for identifying where gaps are in your programs
- Develop benchmarks for new KM strategies to ensure maximum impact
- Identify and evaluate the role of both formal and informal measurements for KM

- Leadership discovery and role
- Tools and methods for aligning programs with corporate values
- Examine various performance measurement frameworks and identify best practices

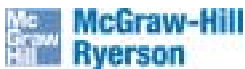
About Your Workshop Leader



Peter Dickens, Senior Developer and Facilitator for **ALIGN LEARNING LTD.** is an internationally recognized speaker, facilitator and strategist. His easy-going style, vivid imagery and broad experience help bring complex issues into sharp focus. For 15 years, Dickens has provided organizational development leadership and advice to a wide range

of private, public and social sector organizations. For the past three years, Dickens was Vice President: Organizational Development at Trillium Health Centre, Canada's most successful hospital merger. He was responsible for the rapid development of an organizational culture that is driven by a commitment to excellence and service. Dickens' private sector experience has typically been in sales-driven organizations that aspire to being market leaders. He has worked with clients in the banking, telecommunications, tourism and high tech sectors, helping them align all elements of the organization behind a client-centered, solution-focused strategy that drives up revenues while building effective client partnerships.

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