

## Study: Connie – The Answer to the Data Dilemma

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**O**nce upon a time, long, long ago... these must be among the seven most familiar, as well as evocative words in any small child's vocabulary and an extremely good way to begin a story. Stories have been part of human society since man first learnt to articulate words and begin the long voyage of communication discovery. Stories are considered to be a fundamental foundation of human knowledge; the mechanism by which we communicate with other human beings in a way that is both comprehensible and memorable. Story tellers such as Homer, Virgil, the saga tellers of Old Norse, Tolkien and, for the modern day saga, J.K. Rowling, have all thrilled their audiences in smoke filled caverns, through the pages of a dusty book or lounging in the comfortable seats of a modern cinema. Communication in action long before Alexander Bell, Bill Gates or the ubiquitous mobile!

I'm sure we all remember the story about when someone was lost in London and

didn't know how to get to where they needed to go. The answer was to ask a policeman! Legend has it that he or she would direct you to where you wanted to go by reference to local pubs! You might get,

*"Down to the Rose and Crown, then left at The George and if you get to the Duke of York you've gone too far!"*

But the decision to ask a policeman or taxi driver was based on the need to know something when you need to know it, coupled with an expectation that, indeed, they would know (and not mug you in the process).

We have all worked inside a variety of organisations, some big and some small, where we have needed to know something when we needed to know it. In all of these instances we would ask someone who seemed to know almost everything about the inner workings of that organisation and its bureaucracy; they knew where the files were stored, they knew who had the inside track on the very subject on which you sought information; they can get you stationery when all other routes to the cupboard are barred; they remember when a customer

orders something special, they can tell you when that customer last called, and even remind you when it is your daughter's birthday. You can ask them vague questions on very wide ranging subjects and they always come back with something relevant and often with the nugget you are looking for. You know the sort of thing

*"Connie, I remember seeing something in the files about a railway company and a telecommunications company that had formed a joint venture in the Far East. I just can't remember who they were or when it was!"*

Connie could find needles in haystacks, occasionally needles in needle stacks and nothing seems too insignificant to be incorporated into her personal database.

I want to tell you a story, a story about Connie.

Let me tell you about this font of knowledge called Connie. Once upon a time Connie worked in my organization. She is a very special breed of person. She recognises that information is power but believes that this is a power for sharing. Connie understands that

the organisation depends on a free flow of information to maintain its edge and achieve its corporate mission. Connie deals with people, enjoys a quiet chat whether it is over a cup of tea by the canteen trolley, or when at the photocopier or outside when having a crafty smoke. Connie loves her job, is a sage, a veritable oracle and, above all, an unsung hero to her company.

Slowly, however, light dawned on management and her value was recognised.

*"We need to do something about this knowledge management stuff I've heard about! You know the sort of thing!"*

So Connie was asked to create a group within the organisation that could store and retrieve information that was considered important to corporate success. So Connie set off to find people who were made of the same stuff as her and, after much difficulty, having recruited her band of fellows, the Registry was created.

And yet Connie knew something about people. Connie knew that they would know more than they would ever say and certainly would say more than they would ever write,

and, indeed, would write more than that they would put into any official record in the registry. She also understood that people rarely know what they needed to know until they needed to know it.

So Connie tried to make sure that the Registry understood where unofficial information networks existed within the organisation and made it the business of the Registry staff to establish a personal rapport with the members of these networks to keep a finger on their respective pulses. So they knew what was going on, who was talking to whom, who was “*in the know*” and, more importantly, who was not. Connie was recognised and welcomed throughout the organisation because she and her team delivered the bacon. It was the classic case of “*not what you know, but who you know*”!

Then one day the organisation conducted a ‘Strategic Review’ using the well respected Management Consultants, MBA and Partners. You know what happened next ...

*"The Registry is a vital part of the business but too much information resides in too few heads... The risk is that as the size of the information grows, the Registry will not*

*cope with the volume... people leave and knowledge leaves with them... Automating the Registry is fully justified on the savings in personnel costs, immediate increase in the ‘bottom line’, and increase in ‘shareholder value’. Modern business processes demand the use of a company intranet which would empower and enable...etc, etc.*

*Management must realize that they need to define their information requirements for the next 5 years so that the system can be designed to meet them!"*

And guess what, Connie and the Registry got right sized! The IT department took over responsibility for the registry and began a ‘User Requirements Study’. Obviously, the department could not ask everyone about what was needed so selected a sample on which to base the study.

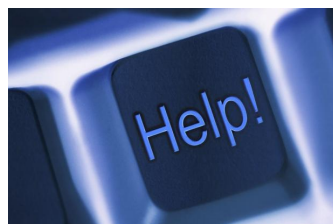
Well, the head of IT was a smart guy. On reviewing the User Study, he said that developing a bespoke solution for the organisation would be both lengthy and extremely costly. He, therefore, proposed the use of ‘internal customisable packages’.

*"We will have a Customer Relationship Management (CRM) Suite, and also encourage the use of a Knowledge Management (KM) Intranet and give everyone an electronic organiser with full diary and email packages."*

All this was fully justified on the cost savings, over a ten-year amortisation. The Registry accommodation was revamped for the new marketing team and Connie and her staff offered alternative jobs at a satellite site some 150 miles away. As Connie left for the last time, after 35 years with the company, those who waved her off were certain that she muttered, *"they seem to know the cost of everything and the value of nothing"*.

You can guess the rest can't you? The CRM was deployed, as was the KM, email and diary system. Somehow the costs that were supposed to be saved did not materialise. The users complained that the systems were complex, unhelpful, slow, and mechanistic and that they still couldn't find what they were looking for. As a result, everyone maintained their own, personal paper filing systems and jealously guarded what they knew. Management was also concerned that

people just ignored the CRM and the KM systems and concentrated their use of the simple email (useful in distributing jokes or office gossip) and the diary system. So what had been lost? What was going wrong? Automation is no bad thing unless it happens to ignore simple truisms. Connie knew that people knew more than they could ever say, that they would say more than they could ever write and, as sure as eggs are eggs, would be reluctant to enter that



information into a database.

Connie knew that, but for her and her group,

nothing would ever end up in the Registry. The Registry enabled and empowered by acting as the interface. The Registry was a support platform to the interface. Remove the interface and you just have systems and processes – alien to most, unhelpful to some and pointless to others.

The Registry acted as a focus for information flows around the company and allowed people to recognise how their individual efforts could contribute to the overall efficiency of the organisation. Employees have empathy with corporate

goals. Without the Registry, and the personal knowledge service given across the organisation, empathy became replaced by cynicism; cynicism about sharing information, cynicism about the new systems and cynicism about the very raison d'être of the company.

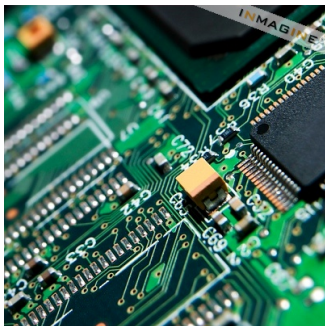
Is all lost? No, not necessarily. Connie and the Registry may be gone but perhaps it is now time to re-look at how we manage information and concentrate on the data rather than on the underlying systems. Indeed, we may wish to bring people back into the knowledge process to provide a 'knowledge interface' and help our employees make sense of it all. This interface is all about people, people like Connie with the skills, experience, intuition and initiative that humans can bring. Find the right people and create that empathy-driven interface which will allow you not only to uncover, but also harness the formal and informal knowledge networks that exist within any organisation for the good of the whole enterprise.

The above story was an all too familiar one of the eighties and nineties. Technology was the answer to every problem. Business

processes ruled and people were relegated to the sidelines. In a refreshing trend of the early 21<sup>st</sup> Century, more emphasis is being placed upon the interaction of people, technologies and processes which is critical to the success of any organisation. A key success factor will be the ability to maintain a balance between each of these three, essentially disparate entities.

Unfortunately, technology changes rapidly, measured in months rather than years. Organisations and processes need to take slightly longer if such changes are to be sustainable and humans change very slowly. One commentator suggests that, even today, the human brain is optimised for life in the Stone Age! Human evolutionary change is achieved in hundreds of thousands of years! To some extent it is easy to see how we slipped into the technology and business process 'love-in'. Both can be delivered relatively easily – far more easily than changing people's attitudes or changing work habits. The 'white heat of the technological revolution' was not just a good political slogan but it allowed a generation of managers to manage without real leadership.

Technology, together with changed business processes, did change the industrial landscape. It replaced the 'blue collar' workforce and eliminated many of the layers of middle management. A generation of management consultants demanded 'metrics' for all, the simpler the better. These metrics were further simplified and refined until they lost the last vestiges of relevance to the original parameters to be measured.



We have seen the paradox of the use of metrics in both the education system and in the National Health Service (NHS) in recent years. Companies using new technologies required considerable capital and investment and shareholders become increasingly focused on short-term returns and 'shareholder value'. Strategic goals were no longer 10 to 15 years ahead, horizons shrank to 2 to 3 years, and operational goals became strategic ones.

The desktop PC, far from releasing senior executives from the drudgery of bureaucratic

tedium, becomes just another millstone. The Blackberry is a rod for our corporate backs. In one company, e-mail analysis of 7 senior executives over a four-week period revealed that they shared in excess of 700,000 e-mails with their close reports. Most were as copy addressees but it took up much of their working and private lives! We are assailed by e-mails, attachments and web addresses; we are over-loaded by data and surrounded by information, but the goal of "*information, as required, where required and just in time for the decision maker*" remains an elusive dream. It is as though we went to the British Library and, as we stand in the entrance lobby, we expect knowledge to come to us by some form of osmosis. We seem to have lost those skills of enquiry that enable us to focus on the essential and ignore the irrelevant.

Some months ago, I was discussing how organisations might better manage their knowledge affairs and enable managers to access relevant information as and when they require. It is a complex issue and is analogous to the labyrinthine problem facing that legendary Le Carré invention, Cold War spy, George Smiley. The answers to the conundrum with which he had been

presented, lay as much in informal knowledge networks, captured in the heads-of-staff within the Secret Service, as in the files and databases of Century House. The spider at the centre of the knowledge web was, you may recall, the famous Connie. It was she who could recall not only the registry files and how and why their contents were important, but she also remembered the activities of the key protagonists, how often they had called for files, which ones and when. She understood the requirement within its own context and could, if appropriate, add considerable value to the enquiry itself.

The key to understanding where information resides in any organisation is an understanding of the human relationships both within the organisation and across the organisational boundary to customers, suppliers, stakeholders, etc. It is a matter of understanding who talks to whom, who shares information with colleagues or who steadfastly refuses to give information to someone else.

We have all been recipients of the e-mailed joke; sometimes we groan at the punch line and hit the delete key, other times we laugh

at it and send it on to our friends, family and colleagues. This spider's web of contacts, if looked at from above, can teach us an enormous amount about how information flows but not necessarily why. Investigating these flows requires both an understanding of the people, as well as the processes they are attempting to undertake.

This is not a clarion call for the processes of a bygone era. This is not about doing things this way because "*it has always been done like that.*"

I recall talking to a friend of mine who, many years earlier, had been in the Royal Air Force (RAF) as part of his National Service. He and a friend had been detailed to paint the rocks bordering the road white, in preparation for a senior officer's inspection. This was originally designed to allow the sides of the roads to be visible during blackout in the Second World War. Well, boys will be boys and our two heroes were larking about, kicked the paint tin over and spilt white paint across the tarmac. Quick thinking suggested that they paint a large white square on the roadway. They did, nobody questioned it and they got away with their mistake.



Twenty-five years later, my friend attended a reunion at this particular air station and, to his surprise, the white square was still bright and freshly painted on the tarmac! One up to process preservation!

No, this story is simply about recognising that when we talk about people, processes and systems, we should remember that people are the key. People represent value and service in ways that process and systems never could. People make processes and systems work. It is to these Human Factors that we should look when trying to create and harness the next generation of organisational advance and the development of enterprise knowledge management.

If we wish to emulate Connie, to allow people to share both the formal and informal knowledge so necessary to good decision making, we must develop systems that operate heuristically, in a manner sympathetic with those employed in the natural communication and decision making processes of people. Those ubiquitous search engines of the Internet – Google and Yahoo – allow users to type in keywords or phrases. They are no substitute for Connie. Just try asking Google to find the answer to

the question relating to a railway company and a telecommunications company which had formed a joint venture in the Far East. Connie brought intelligence and intuition to the problem. Search engines have difficulty when dealing with ‘simple’ words such as ‘if’, ‘next’, ‘be’, etc. Type in “*to be or not to be*” and there is likely to be no response. Connie, of course, having played Ophelia in the local amateur dramatics society, would have no difficulty in recognizing the importance of the phrase! Modern computer systems are getting better and sophisticated relational databases allow access to more than one silo of data, but relations need to be defined at the outset. How often do we, as human beings, follow our instincts when researching for some key piece of information? We probe, test and seek in manner similar to the way a terrier worries sheep. We approach the problem from one direction, back-off and try another. We make connections we never thought possible when we started the process. How then can we give such richness and contextual depth to computer search?

Progress is, however, being made in the understanding of knowledge within human organisations. The increasing use of



sophisticated tools to tap into the knowledge and experience of employees, for example, the use of story telling and multi-media to supplement the written record and to endeavour to render corporate knowledge accessible across all those who require it, is beginning to create recognition of the problem. The recent US examples of Enron and World Com, as well as those closer to home like BCCI and Equitable Life, have demonstrated the importance of “*knowing what you know*”. The non-executive directors of Hollinger International probably wish that they had had a better grip on where their company’s finances were being spent. How often in life do we hear the words “*Oh if only you had asked me, I knew all about that.*” The recent implementation of the Freedom of Information Act requires Government organisations to respond to requests for information within 20 days – Connie could meet such tight deadlines but can the systems that have replaced her? Compliance issues in the light of Sarbanes-Oxley and Basel II will have equally important effects upon financial institutions and other corporate bodies.

The rapid development of knowledge technologies over the past half-century has

surpassed anything experienced before. The ubiquitous birthday card with the pre-recorded message represents more computing power than existed in the entire world in 1954 or in the lunar buggy of the 1960s. It is small wonder, therefore, that we often find it difficult to integrate these advances across human behaviour and our organizational processes.

It is the cultural change that is often the most difficult to achieve and often because we try to fit the culture to the technology rather than vice versa. Sometimes, however, it is important to change behaviour to enable technology to deliver benefits but, we need to look at the human process and technology paradigm in a holistic manner. To this end, we cannot divorce the people from the organisation or the organisation from the technology. People must be put back at the heart of the solution with organizational processes and practices, together with the tools of technology to act in support of them. From a technical perspective, we need to develop mechanisms that give us a far greater ability to search across disparate databases, including those occasionally described as ‘legacy’ or ‘heritage’ systems. We need to ensure that the technology does

not strip away the richness of context and permits fast, accurate and intuitive searches across any number of database structures.

It is this ability to fuse data in a heuristic manner – blending technical data search with cultural, social and human aspects – that adds considerably to the complexity of the requirement. It may not be possible today, but the rapid advances in computer power over the next few years, will offer us an opportunity to meld data, intuition and context in a rich and meaningful way. In today's fast moving, global world, Connie may seem to be something of an anachronism. The skills she represents, however, remain desirable if elusive. The ability to know where knowledge exists within an organisation, where the information flows exist, who talks to whom and why many of an organisation's processes have grown up, is key to supporting the effectiveness of individual decision makers.

To know who knows more than they could ever say, say more than they would ever write and write more than they would codify in a database, is the key to the next generation of the Information Age.

*Views expressed in this article are not necessarily those of SAGE International*

HELP image:

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