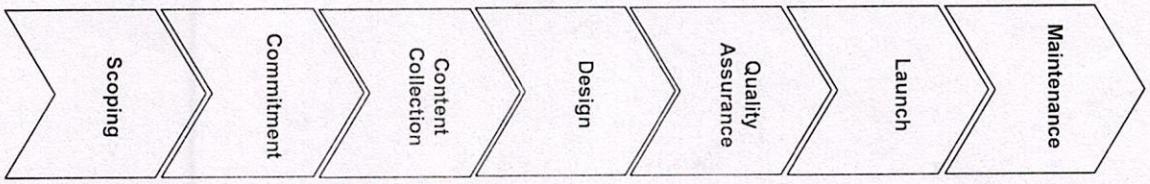
Appendix 2: A 7-phase Guide to Implementing Communities of Practice

All colleagues who are considering setting up communities of practice to share ideas, experience and documents, should contact the Improvement Service (knowledge management unit) to express initial interest. You will then be contacted to arrange for an initial meeting to walk you through this implementation guide.

This document presents a step-by-step guide to setting up a community of practice, which is supported by a collaboration site. The framework highlights:

(1) the seven major phases to set up a collaboration site
(2) the key questions for each phase
(3) the key activities for each phase
(4) the key reference materials for each phase
(5) the key deliverables for each phase
(6) the work effort required and duration for each phase
(7) the support from the knowledge management team for each phase

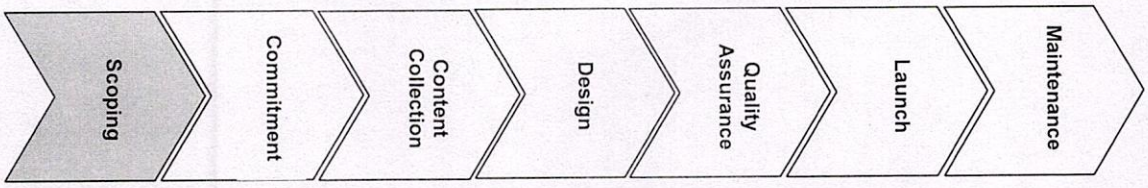
The 7 phases required to set up a collaboration site are:



Each of these phases will be illustrated in detail in the following sections. The timeline to set up a collaboration site is expected to be two to four months.

1. Scoping Phase

In this phase, the business unit has expressed interest in setting up a collaboration site. The business manager is asked to explore this further with the knowledge management unit.



Key Activities:

- Contact knowledge management unit to express initial interest
- Initial meeting with knowledge management unit
- Initial meeting with business sponsor
- Understand current challenges in knowledge sharing
- Gather initial business and user requirements

Key Deliverables:

- Initial business case
- High level business and user requirements

Reference materials:

- Community building planning checklist
- 7-phased implementation guide
- Business case template
- Business and user requirements template

Knowledge Management team support:

- One-hour initial consultancy session
- Provide advice on the tools, processes, work effort in managing the community intranet
- Emphasise the commitment required to set up and sustain a community
- Log initial request and follow up in 2 day's time

Work Effort:

- Duration: 2 days

Key Questions:

Business Objectives:

- How will the setting of a Community of Practice help your business unit achieve its objectives?
- What key benefits do you want to achieve?
- What is the business case?

Users:

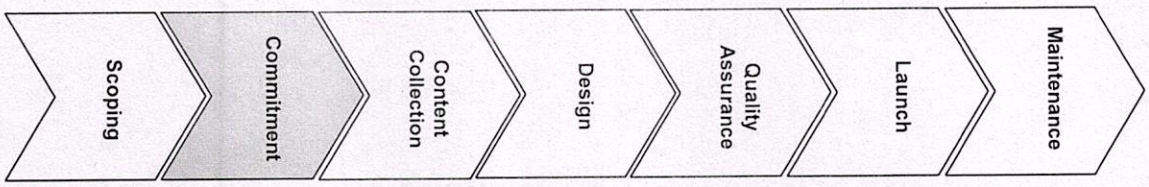
- Who is the key sponsor?
- Who are the intended users?
- Where are they globally?
- How will the intranet help them to perform their jobs?
- How do users currently access and utilise corporate information on a daily basis?

Content:

- What content and applications are currently being provided to the users?
- What will the intranet site's content scope, volume and structure be?
- How long do you want to keep the community/intranet site going?

2. Commitment Phase

In this phase, the business unit has made a final decision to set up a community of practice. A business sponsor and a community manager (or facilitator) will be appointed and take the responsibility to facilitate knowledge sharing and collaborative working.



Key Activities:

- Business sponsor appoints community manager
- Develop final business case (include knowledge sharing strategy, implementation plan, success criteria)
- Set up project team
- Kick off meeting with key sponsors and content owners

Key Deliverables:

- Project initiation document (including final business case, project timeline, knowledge sharing strategy, resources)
- A re-written job description/job plan of the community manager

Reference materials:

- Project initiation document template & sample
- Sample community manager job description
- Community/knowledge manager competency (technical skills and behavioural competency)
- Community manager's training time-table
- Information governance standards and policies (e.g. Data Protection, Freedom of Information, Data Standards, Records Management, Plain English)
- Awareness of the existing knowledge databases

Knowledge Management team support:

- Register the new community to the corporate directory
- Assign a relationship manager to this community
- Attend the kick-off meeting and subsequent meetings
- Enroll the community manager in a training session
- Bi-monthly review meeting with community manager
- Provide ongoing support/helpdesk (toolkit on KM intranet)

Work Effort:

- Duration: 3 days + 2 days training

Key Questions:

Measuring Success:

- How do I measure the effectiveness of the community in achieving its defined objectives?

Resources:

- Who is the key sponsor?
- Who is the knowledge manager?
- What are the roles and responsibilities of the knowledge manager? What competency is required for this person?
- Are you aware what documents have to be kept as records and for how long?
- Who is in charge of collecting, gathering, reviewing and disseminating content?

Training/Culture:

- How are you going to train the community members on knowledge sharing process and tools?
- How do you ensure that you have a knowledge management communication slot in all upcoming regular meetings?
- How do you encourage members to share and use the resource?

Defining the scope:

- Do you want a new collaboration site?
- Do you want a mailing list?
- Do you need a private site to share documents and ideas within your project team members?*
- Are you aware of other communication channels? (e.g. video-conference; teleconference)

Work Effort:

- How much time is needed to set up the collaboration site?
- What resources and infrastructure is needed to ensure content is refreshed and reviewed on a regular basis?

3. Content Collection Phase

In this phase, the community manager focuses on identifying content to be created and shared on the collaboration site, defining content owners and content management process.

Key Activities:

- Conduct user studies to understand what members need
- Conduct knowledge audit through desk research, focus groups and in-depth interviews to find out what is available
- Measure the effectiveness of the current intranet site
- Conduct a pre-launch survey
- Collect and/or create new content
- Establish a process to refresh and weed content from the intranet site and the archival procedures.

Key Deliverables:

- Expert list and membership list
- Inventory list of content types and information products
- Define content management process map for each content type (i.e. content types, owners, frequency of update, expiration date, retention period)
- Draft intranet site map (listing all key information products)
- Completed design checklist (e.g. access rights, admin rights) and records management checklist

Reference materials:

- Summary findings of knowledge audit & intranet survey
- User studies sample interview questions
- Content inventory list template
- Corporate retention and FOI policies
- Tips to promote knowledge sharing culture

Knowledge Management team support:

- Records manager review community document types
- Community manager review the content inventory list to develop draft site map, and to advice on migration strategy
- Provide usage statistics report for the current intranet site
- Bi-monthly review meeting with the community manager
- Advice on the scope of the future intranet site by taking into account of the community manager's skills
- Provide ongoing support/helpdesk

Work Effort:

- Duration: 2 weeks – 6 weeks

Key Questions:

Measurement:

- How good is the current collaboration tool (if exist) in helping their members?

Defining content:

- What strategic content do users want?
- Where does the content currently reside?
- Who are the experts? Where are they?
- What content is missing and has to be created or captured?
- How long should the content stay on the intranet site? What is the retention schedule after it expires?
- Where will the content reside? (newsletter, intranet site, discussion list, document library)
- How do I migrate appropriate content from the current too (e.g. shared drives) to the new one?

Information governance:

- Does content comply with confidentiality policy? Data Protection policy? Freedom of Information (FOI) requirement?

Define content management process:

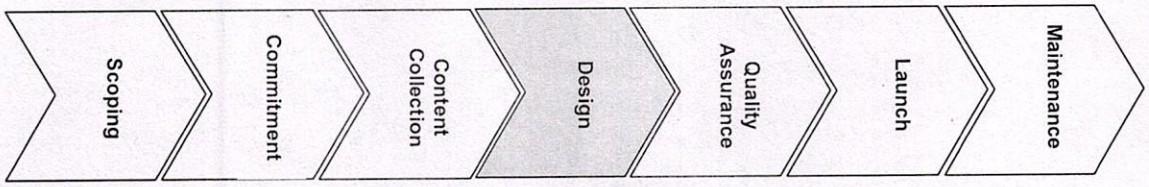
- What are the responsibilities of members? Who are the community manager, moderator and subject experts?
- What are the decision rules for contributing, editing, reviewing, deleting, retiring or archiving content from the intranet? How often? By whom?
- Have you established a publishing calendar to ensure regularity of content?

Establishing a knowledge sharing culture:

- How will the business units provide incentives for employees to contribute content?
- How do you create trust in the community?
- How do you communicate to and train your users to use the collaboration site and other knowledge sharing tools?

4. Design Phase

In this phase, the community manager focuses on defining the technical functionality, the site structure and the look-and-feel of the new intranet site.



Key Activities:

- Develop a site map, establish site prototype with page-by-page mockups of user interface and labeling systems
- Usability testing and prototype refinement
- Build the collaboration site
- Develop training/communication plan

Key Deliverables:

- A working collaboration site
- A working private team site (optional)

Reference materials:

- Site templates, publishing & design standards
- Standard labels for all community sites (e.g. membership list, expert list , contact info, events, projects, organogram)
- Corporate taxonomy (e.g. subject list and document type)*
- Listing of products & services (e.g. functionality checklist)
- Listing of non-electronic communication channels
- Access control and security policy*
- Guidelines in setting up web parts & document libraries*
- Guidelines on how to write good websites

Knowledge Management team support:

- ½ day workshop with collaboration tool manager
- ½ day workshop to set up document library upload form*
- 1 day tool training for the community manager
- Deliver a site (with standard web parts, a black shell, doc library, discussion forum, defined access right) for knowledge manager to populate it with content*
- Confirm the site complies with IT policies
- Bi-monthly review meeting with the community manager
- Provide ongoing support/helpdesk

Resources:

- Duration: 2 weeks – 4 weeks

Key Questions:

Organising the content:

- Where does this collaboration site fit into the overall IS site navigation structure?
- Do you need additional metadata to classify your documents?*

Select the tools:

- What are the 'must-have' functionalities? (e.g. document library, discussion, usage)
- What is your functionality 'wish list'?
- What other existing databases can you exploit?
- How do you measure the usage of the site?

Searching:

- What filters do you want to use?*
- What views do you need to display documents?*

Look and feel:

- What visual metaphors will be used across the site, and with what degree of consistency?
- What template design can I choose from?

Usability testing:

- Can users easily locate specific documents?
- Do the labeling conventions make sense to your users?

Information governance:

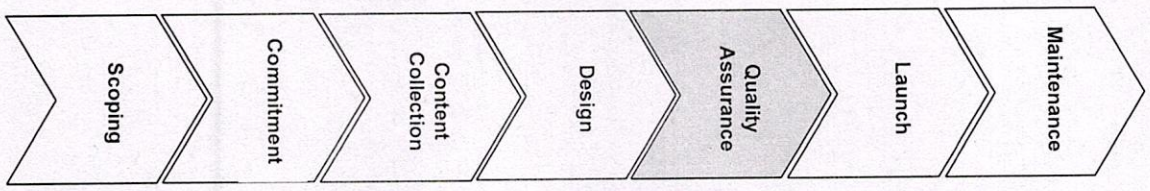
- Content comply with data standards? FOI? ERM policy?
- Who has access rights to specific sections?*

Resources:

- Who will actually be maintaining the site? What expertise is required?

5. Quality Assurance Phase

In this phase, the community manager has to ensure that the collaboration site is ready to go live. The collaboration site will be signed off by the business sponsor and the Knowledge Management Unit.



Key Activities:

- Conduct QA Testing
- Sign-off meeting with key sponsor

Key Deliverables:

- Positive QA testing result (by site manager)
- Project sign-off (by business sponsor and KM Unit)
- Completed customer satisfaction survey
- Project debrief

Reference materials:

- QA checklist
- Project initiation document
- Listing of critical success factors to demonstrate the community/intranet is effective

Knowledge Management team support:

- One-hour QA testing session
- Issue sign-off document
- Inform IT before site launch (if needed)
- Issue customer satisfaction survey (and follow up within 2 weeks – build into the request log template)
- KM communication manager write a story to report on the new community
- Relationship manager collects lessons learnt, sample working documents and best practices (to put up on the KM intranet site)
- Sign-off meeting with key sponsor
- Bi-monthly review meeting with the community manager
- Provide ongoing support/helpdesk

Resources:

- Duration: 1 day

Key Questions:

Business objectives:

- Does the site achieve its defined objectives set in the KM strategy and project initiation document?

Quality assurance:

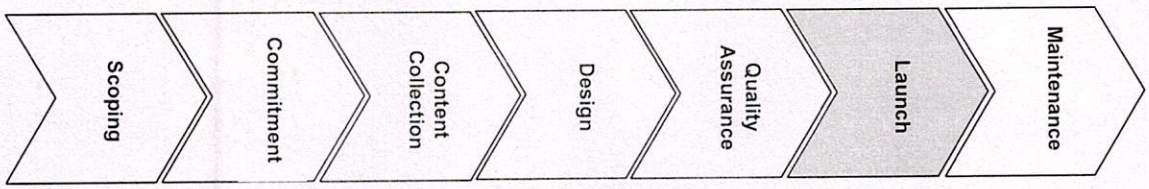
- Have you checked all typo errors?
- Have you checked all links are working?
- Have you checked all content is current?

Evaluating the KM team services:

- Are you satisfied with the services provided by the knowledge management team?
- What do you like most?
- What needs to be improved?

6. Launch Phase

In this phase, the community manager announces the launch of the 'community of practice' collaboration site. He/she has to implement a communication plan to increase awareness and drive members to use the intranet site.



Key Activities:

- Implement a training/communication plan
- Communicate to primary and secondary target audience
- Organise launch event, demo and roadshow
- Distribute promotional leaflets
- Distribute souvenirs, communication/training packs
- Insert a KM promotion slot in all key business meetings

Key Deliverables:

- Marketing materials (leaflets, CD-ROMs)
- Announcement in internal communications channels
- Launch event
- Members master distribution list
- A master schedule to train community members
- Regular communication and training for members

Reference materials:

- Tips for marketing sites
- Sample marketing materials
- Sample training/communication plan

Knowledge Management team support:

- Participate in launch event
- Announcement in KM communications (e.g. newsletter)
- Communication Manager write success story
- Communication Manager share success with key internal stakeholders

Resources:

- Duration: 1 week

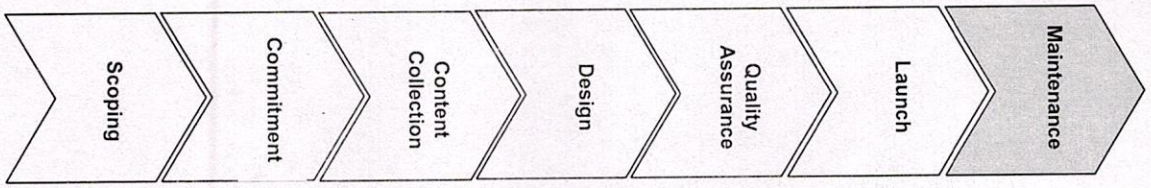
Key Questions:

Marketing the site:

- Is the key sponsor involved in communicating key messages?
- How do you invite potential members to join the community?
- How would you invite new members to join the community?
- How do you share updates with your members?
- Are you aware of the various communication tools?
- How do you link the site to offline activities (e.g. meetings, conferences, training, print publications)?
- How often do you plan to have a membership drive?
- How would you train your users to use the tool and to share content?

7. Maintenance Phase

In this on-going phase, the community manager will review the effectiveness of the 'community of practice' collaboration site and maintain the momentum to sustain the site.



Key Activities:

- On-going communication and user training
- Prize and awards for knowledge sharing
- Collect and write up 3 success stories every 3 months
- Monthly review of usage and users' feedback
- Quarterly review of the content management process, tools and related issues
- Annual review of the intranet site content and functions

Key Deliverables:

- Content aging report / records audit
- Monthly usage statistics report
- Annual site review report (for sponsor)
- Regular awards and prizes to recognise contributors
- Success stories appear in members newsletter, and reported in management team meetings

Reference materials:

- Template to collect success stories
- Measuring the effectiveness of the intranet site

Knowledge Management team support:

- Registering of current and new communities of practice
- Monthly conference calls/meetings with community managers
- Monthly usage statistics league table
- Communication manager proactively gather success stories to demonstrate benefits of knowledge management
- Annual global KM conference, annual global KM award
- Annual site review with key sponsor and knowledge manager
- Annual records audit
- Provide ongoing support/helpdesk

Resources:

- Duration: monthly meeting

Key Questions:

Usage review:

- How are users actually accessing, navigating and using site content? How often?
- How do you gather feedback from your users?

Contribution review:

- How many contributions are made to the site?
- How many contributions are declared as records to the site?

Weed our unused content:

- What documents are not being accessed? Why? Should these documents be archived or deleted? Who should make the decision?

Sustaining the knowledge sharing momentum:

- How do you promote a sustainable knowledge sharing culture?
- How will the business units provide on-going incentives for employees to contribute content?
- Have you tied in the content collection process with the key business process?

Business objectives review:

- Is there a measurable improvement in information accessibility in comparison to the period prior to the intranet implementation?
- How do you measure the impact of your site?
- How do you measure the business benefits?
- Is the site still serving the business objectives?
- How long do you want to keep the site for? What criteria do you use to decide that the site should cease to exist?

Last updated: 16 Nov 2005 for Improvement Service