



Knowledge retention

By Michael Hogan, A.I.A.

Capturing the knowledge within your firm will lead to a better distribution of information and fewer chances that knowledge will be lost through 'leakage': retirement, resignations, or promotions. Knowledge retention also allows new team and office members to bring themselves up to speed more readily.

The types of knowledge needing protection include project knowledge, business knowledge, and even office procedures.

In July's column, I mentioned the kind of knowledge retention tool I'd like to see used in an A/E/C firm. For those firms who want to get a taste for knowledge retention tools without investing in a consultant to build one, there are some low-cost, baby steps that can be taken.

One tool I have mentioned before is a *wiki*. Wikis are the most open and democratic knowledge container available. A wiki is like a whole team assembling and editing community documents. Anyone with access to the wiki can put in their two cents — adding their own opinions, commenting on those of other contributors, or even editing the entries of others. New pages and topics can be added by anyone at any time.

New wiki topics and recent changes are listed on the first page, so you can see them as soon as you connect. Wikis takes a little effort to learn and use, however they are fully searchable, available for almost any web server, and the software is free (or very cheap). With so many people involved in entering and organizing information, it is easy for wiki topic organization to go awry, however this also is easily correctable.

The three primary drawbacks are its completely democratic, passive nature, and its lack of links to e-mail. By 'passive' nature I mean that the resource is there whenever you go there to look for it, but it never goes looking for you when there's something new you should know.

I was involved recently in a project that needed some form of communication for a geographically dispersed project team, and a no-cost wiki was used. Although information was posted there, team members visited the site less

and less as time went on. Without activity, the wiki floundered, the information got stale, and no one used it as a resource. It is frequent activity that keeps these resources fresh and valuable.

A different means of knowledge retention that is gaining popularity is *web logs*. Blogging — maintaining web logs — has become a favored method of publishing daily or weekly group comments on the web.

A blog is like a single expert publishing frequent articles with others replying with 'letters to the editor.' One expert posts articles, and the rest of the team provides commentary. Most web logs are searchable, they provide the ability to easily include images and other files, and the software is available for free or a low cost. Unfortunately, it also has no particular connec-

tivity with your in-house e-mail (where most project activity happens) nor does it have any particular notification features to remind users of new activity.

There is a very interesting, low-cost package from Traction software (www.tractionsoftware.com) that mixes the collaborative and organizational aspects of the wiki with the ease-of-use features of web logs. In addition, Traction adds e-mail connectivity features.

Addressing notification issues, Traction users can 'subscribe' to notification of additions or changes. This type of notification increases collaboration by encouraging team members to visit the site to respond and stay informed. Additionally, a 'journal' of recent additions can be launched automatically to team members on a daily, weekly, or other timed basis. The 'journal' methodology works well for upper management and team members who want to stay informed without participating regularly.

Addressing input issues, e-mail accounts can be monitored by the software to insert contents and attachments into the site automatically. This way, getting e-mail contents into your knowledgebase can be as simple as copying or forwarding to the project or topic e-mail address.

All of these software options can be installed on your own web servers and operate on any of several operating systems (Windows, Linux, et cetera). This is very important. In my opinion, it is essential to either have physical ownership of your data or to have it easily downloadable from your web service. The reasons for this are twofold. First, you must protect yourself from dependence upon a service that may fold, be bought out, change business models, or change its pricing structure. It is still early in the application service provider (ASP) marketplace and turnover is high. You sure don't want to lose your carefully accumulated knowledge to someone else's business decisions! Second, the information that you have been gathering may have many other uses in your office — so make sure you can import it into your in-house data repositories.

Some other knowledge retention solutions rely on peer-to-peer sharing. We'll have to touch on these in another column. ■

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