



INNOVATION CO-CREATION

Bonnie Cheuk details how Environmental Resources Management is enabling its staff to generate and share knowledge and insights and then using those ideas to influence its future strategic direction

“What is a good way to harness the collective intelligence of all our staff to enable the development of our new strategic direction to be truly innovative?”. This is the question that Environmental Resources Management (ERM) has been responding to since September 2009, and will continue to do so into mid-2010.

ERM is a leading global provider of environmental, health and safety, risk, and social consulting services. It has worked with more than half of the Global Fortune 500 companies and many governments, helping them to understand and manage their affect on the world around them. ERM has 137 offices in 39 countries and employs 3,300 staff.

Co-creating our strategy with staff at all levels is an innovative management approach and is much easier said than done. Once the decision is made, the senior leaders are fully committed to making it happen. So far, they have assisted the involvement of the knowledge management (KM) team by introducing up-to-date knowledge sharing approaches and maximising the use of Minerva, our award-winning, interactive intranet.

Our senior leaders do not want just another staff consultation exercise, nor an experiment in how to use online forums or blogs to stimulate staff interaction. Instead, the KM team has been asked to partner with the senior leaders and given the remit to be as innovative and creative as possible in finding ways to enable our staff to generate – and share – their best ideas to help shape the company's future.

The engagement project (Phase one) ran from September to November 2009; leading to a decision phase (Phase two); and, continuing into the implementation stage (Phase three).

This project is critical to ERM's future and that of its employees and is taking our KM programme to the next level, in terms of communication principles and approaches.

Redefining knowledge as 'knowledging'

In 2006, ERM rebranded KM as 'knowledge sharing'. In 2008, we redefined 'knowledge sharing' to 'knowledge sharing and communications (KSC)' – such changes signal how ERM has redefined its attitude to KM. Informed by Dr. Brenda Dervin's work¹, our definition of knowledge is introduced below:

- ERM doesn't follow the data/information/knowledge/wisdom pyramid in defining knowledge. Knowledge can be data, content, opinion, values, facts, hunches and aspiration. It is defined as any content that can help an employee

to make and 'unmake' sense of changing business situations. We welcome best practices as well as emerging ideas;

- Knowledge is not defined as a 'thing'. We are conscious that knowledge transfer between employees is nothing like transferring water from one bucket to another, but is a process of meaningful and evolving exchange. It must, therefore, be based on two communication principles, whereby both parties change at the end of the knowledge transfer. We are conscious that when creating more message exchange channels (whether face-to-face meetings or online forums), we cannot assume that the increased staff participation will mean that better knowledge is shared. We are conscious that we need to focus on defining and facilitating procedures that enable in-depth dialogue;
- Web 2.0 tools are not seen as a panacea – face-to-face events play a complementary role, so we seek to fully integrate and balance both aspects. We are conscious that setting up a blog or online forum does not mean that staff are actually willing to comment or ask questions, and we are mindful that some may be wary of sharing their ideas with more senior, or experienced, individuals. Too often, Web 2.0 applications are designed with top-down communication implicitly assumed as the outcome. We are aware that if we are to co-create the new strategy with all staff, we must encourage input from those who have previously felt disempowered.

In short, knowledge sharing is re-defined as 'knowledging'² and knowledge sharing is the communication process in action. We are placing increasing focus on promoting genuine dialogue and two-way communication. As a result, both senders (senior leaders) and recipients

(staff) are able to gain new insights and learning together – the lines between senders and recipients are blurred and they become co-participants.

Web 2.0 and beyond

Led by the CEO, John Alexander, the strategic development programme works in three phases:

- Phase one – the discovery phase, which enabled staff to generate and share their ideas. This ran from September to November 2009;
- Phase two – the decision-making phase, which enabled senior leaders to make key strategic decisions, and ran from November to February 2010. Staff insights gathered in Phase one are drawn upon, and additional ideas sought in areas of focus;
- Phase three – the implementation phase, when the final strategy is signed off by the board, and roll-out commences. Strategy execution will begin in March 2010 and will involve the design of ongoing staff communication and engagement activities.

I will focus the remainder of this commentary on the innovative approaches implemented to enable the first two phases. In particular, I was responsible for designing and implementing a campaign to collect masses of employee ideas from multiple channels – both online and offline, depending on the focus and timelines available.

September 2009: Kicking off the new strategy development process

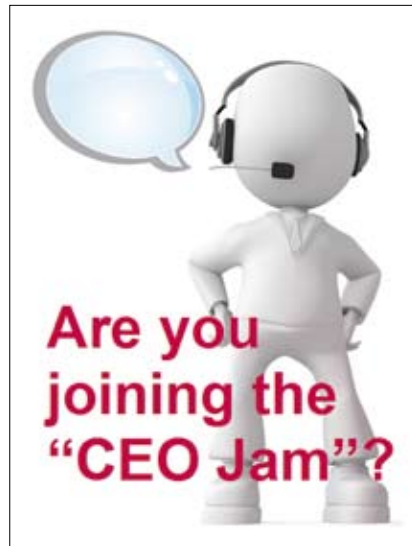
- An interactive 'new strategy development' intranet site was set up to host all the background materials and emerging interactive forums. Any office managers who needed to draw on corporate materials to engage with staff were able to come to this one-stop shop to collect tools and messages;

2. A series of posters was designed to support the campaign and used across all communication channels;
3. An in-house promotional video was produced to inform staff about the new strategy development process and invite them to get involved. The video showed staff members from around the world working on internal and external client projects. Regarded as inspirational by our staff, the video recognised that they are the ones who have enabled ERM to be the success that it is today. The video was embedded in the strategy blog, so that staff can leave comments for the senior leaders. A new section, with a poster inviting staff to watch the video, appeared in a prominent area of the Minerva home page on the kick-off date;
4. The CEO published official news headlines on the Minerva homepage to inform staff of the new strategy development process. He also published regular posts on his blog, to help set staff expectation levels;
5. A strategy blog was also set up, upon which senior leaders took turns to provide a weekly update for staff and encourage participation. Leaders also contributed by proactively replying to staff comments and questions using the blog.

October 2009: Opening up all channels to share staff insights

In October, five ‘channels’ for knowledge sharing were rolled out to enable staff to start communicating:

1. Global office meetings – a series of face-to-face meetings organised worldwide to inform staff about the new strategy development process and introduce the wide range of communication channels available to make themselves heard. A Flickr-style library was set up to enable staff to upload photos taken during their meetings. These become useful resources in the development of future communication materials;



Promotional material

2. ‘Tell us your insights’ forum – drawing on Dave Snowden’s mass narrative capturing tool, this was set up to enable individual staff to tell a story to share their insights and post individual meeting notes. As employees are geographically dispersed, outcomes of these face-to-face meetings were also captured here and shared globally on Minerva to stimulate further thoughts and dialogue. All the insights gathered were summarised then presented back to the senior leaders at the end of each week to enable them to act quickly;
3. ERM tweet – an internal tweet application, which enables our staff to type their 140 character message in the subject line of an e-mail and send to a tweet e-mail. It automatically appears on the ‘Strategy Tweet’ section on Minerva. All tweets are immediately visible to everyone;
4. Telephone hotline – enabling staff to dial a number and record their insights (anonymously if preferred), which were then transcribed and posted on the ‘Tell us your insights’ forum;
5. Anonymous contribution by e-mail – if staff had some insights to share but did not want to put their names to them, they could e-mail

a confidential mailbox, which were accessible only to the author;

In addition, the CEO and senior leaders continued to update the blogs, weekly. We also produced a few more video clips and audio podcasts, which were embedded in those blog posts. All news and engagement activities continued to invite staff to read the blogs post comments.

Weekly headline news about the initiative and insights gathered appeared on the Minerva homepage and in our monthly electronic newsletter.

End of October 2009: ‘CEO Jam’ – All staff speak directly with the CEO

As the gathering phase drew to a close, I organised a ‘CEO Jam’, where I acted as ‘DJ’ on a ‘live radio show’ enabling senior leaders to share what they had learnt from staff so far (four weeks after the consultation began). It was also an opportunity for staff to call in and share any further insights directly with the leadership team – using either an international dial-in number or Microsoft Office Communicator. The call-in was facilitated to ensure that everyone didn’t speak at the same time, using a queuing system. The ‘Jam’ was broadcast live on Minerva and could be replayed by anyone who missed the event.

To support the CEO Jam, posters were updated on the Minerva homepage and a section was created to showcase the profiles of staff who shared their insights, as well as the responses from the senior leaders.

All the insights gathered were taken into a face-to-face leaders’ meeting, where around 50 partners gathered to review and share their own ideas. While not every member of staff could attend this meeting, the aim was to bring input from all areas of the business into the same room.

Mid December to January 2010: Digging deeper into the topic of sustainability

Sustainability – improving long-term business viability by reducing

My Career | Our Clients | My OpCo | Practices | Sales Support & Global Tools | Partnerspace | Sites | Minerva Support

Home > Our Strategy Our Future

Our Strategy Our Future

This list is managed by "Tell us your insights..." forum moderator, Bonnie Cheuk. My goal is to ensure ERMers posting to "Tell us your insights..." forum is anonymous, and yet allowing ERMers to see what are the emerging ideas. You are welcome to comment on

All ERMers are invited to share your vision to shape ERM's future. Before or after you have attended a local office meeting, use "Tell us your insights..." Forum to:

- share discussion outcomes from staff meetings
- share your personal or your team's vision, reinforce the points you have raised in staff meeting

Every staff insight counts. Each input will be reviewed by the strategy development team every week to allow them to test any hypothesis and to challenge their current thinking. #

This list below shows selected ideas/insights that have been submitted to "Tell us your insights..." forum or ed@erm.com without disclosing names and identities. Contact the moderat

Our Strategy Our Future

New | Actions | Settings

My Vision (in one word) | What and where should ERM be in 2015/2016? | Reply | Explain | My proposed vision addresses this strategic area | Organization Model | My proposed vision relates to the ERM Core Service | My proposed vision relates to B

Count = 390

- My proposed vision relates specifically to this region : AP - Australia/New Zealand (18)
- My proposed vision relates specifically to this region : AP - North Asia (1)
- My proposed vision relates specifically to this region : AP - South Asia (32)
- My proposed vision relates specifically to this region : APAC (99)
- My proposed vision relates specifically to this region : EMEA (58)
- My proposed vision relates specifically to this region : EMEA - Central Europe (1)

Staff insights section on Minerva

environmental impact and managing limited resources, in a socially acceptable manner that maintains or increases profitability – is becoming an important business issue.

ERM is serious about sustainability and has been working hard in this area for more than 30 years. We offer sustainability services to our clients as well as 'walking the talk' by ensuring we include sustainability in everything we do.

By drawing on the extensive research we had done in the past 12 months, as well as the additional insights gathered during Phase one, the senior leaders invited staff to reflect on our collective knowledge and propose anything that was missing, along with any new ideas to enable ERM to further push the boundaries.

An online discussion forum, 'Sustainability Hub', was launched on the Minerva homepage and resulted in a vibrant discussion during the usually quiet holiday period in December and January. Many of the ideas provided in-depth, high quality and specific recommendations on how ERM could improve. The senior leaders answered any questions and offered additional comments and queries to tease more ideas from staff.

At time of print, the Sustainability Hub has recently come to a close. The leaders will be using the insights to inform ERM's internal sustainability programme, as well as to innovate new services for our clients.

Leadership 2.0 in action

Ultimately, ERM has mobilised staff insights and aspiration to help shape the new strategy. The channels available open up more space for dialogue and, more importantly, the leaders have used every single idea to inform their decisions in strategy meetings and will continue to draw on this knowledge base moving forward. They continue to use the ideas and photos collated to develop future communication messages and, therefore, put that knowledge into action.

Web 2.0 is generally regarded as easy because any user can generate content at any time. But there is a danger that KM practitioners assume that the application of Web 2.0 can choose its own course (separately from face-to-face meetings and senior leader support), so does not require any design effort. Whereas, in fact, it requires the closest attention to communication procedures, and full commitment from senior leaders, to make it more than a 'show'. Therefore,

the 'design' of knowledge sharing activities must be rigorous and well thought through, including:

1. A conscious decision to use a wide range of channels – both face-to-face and online – to promote genuine two-way dialogue;
2. Using online tools to facilitate lateral discussion rather than top-down, one-way communication between leaders and staff;
3. Asking staff for *honest* insights – which means management must expect some complaints or frustration to be voiced, while staff are contributing ideas for the future. Senior leaders are coached in how to take such criticism seriously, while not becoming defensive. They have committed to 'taming their ego' to consciously encourage dissent, tolerate alternative views, and learn from staff;
4. Valuing everyone's input by ensuring that the Web 2.0 tools did not silence certain voices. This includes allowing anonymous posting to address power issues or to help colleagues who are less technology savvy;
5. Using blog writing as a learning tool to promote self-reflective learning

among senior leaders. By committing to the discipline of writing the blogs, the CEO and senior leaders have to reflect deeply on staff insights shared and provide their own views regularly. That blends knowledge sharing and self-learning, helping them to make better use of the staff insights and reflect on how they relate to their own roles and work;

6. Welcoming the surprises that appear when you open genuine, online dialogue. Some of the results are hard to hear, while some are immediately useful innovations;

A clear expectation was set up-front by the senior leaders that they might not be able to take on board every single staff insight, when making difficult decisions about ERM's future. However, the insights shared would enable them to focus on issues close to staff's hearts and minds, to consider insights they had not considered previously – and, the emerging trends and themes would enable them to make more informed decisions about our strategic direction.

Benefits

The efforts of the KSC team have proven successful in a number of ways.

The staff participation rate is exceptionally high, which is a vital requirement in meeting the business objectives of co-creating the company's future with staff. Face-to-face meetings have taken place in all offices and the number of ideas submitted came from more than 3,100 staff (out of 3,300) and consolidated into some 400 insights. The cumulative visits to strategy related Minerva pages reached 20,000 between September 2009 and January 2010.

The exchange (and quality) of ideas is intense. In many of the office meetings, the workshop was originally scheduled for 90 minutes, but often became a super-interactive and vibrant discussion, which lasted for three hours. One facilitator told me, "The staff didn't want to stop. They were really enjoying it".



Promotional material

The interaction on the blog sites is vibrant and in-depth – the reason being that the leaders were drawing on questions and comments they received in face-to-face meetings, and then discussing any controversial points publicly on the blogs. Colleagues could see the authentic voice of the leaders, and then join the discussion with them.

We received a lot of positive feedback from the participants of the CEO Jam. This quote summarises the sentiments: "It was a very enlightening meeting. There were a lot of positive comments and very important questions, which made the conversation interesting and useful. It was a really productive session. I think it was an opportunity, at a very important level, for all the staff to get involved directly with the company; sharing what we expect of ERM, our doubts, proposals and comments helping to build the company's future. I also think there is a clear desire from everyone to contribute to define the new strategy and it will have a very positive impact in ERM's future."

The senior leaders commented: "We have taken the way we collect insights from staff – the way we communicate and share ideas with one another – to another level, to the extent that we cannot go back to the previous way of working anymore".


The process itself has already brought about positive change at ERM and is beginning to influence its future vision.

The beginning of the future: Vision conclusion

The initiative is a bold step by the senior leaders and reflects a culture

of knowledge sharing and open communication, which has been gradually built up in the past few years. *With its current strategy project, ERM is proving just how far it has come in its journey to be a truly collaborative and global company.*

Too often, KM practitioners bemoan, 'How can we get employees to be willing to share their knowledge? How can we use Web 2.0 to do this?'. These questions miss the point – KM projects must align closely with the company strategy. 'Knowledgeing' must rest on sound principles of communication. We have to go beyond information and content management – which is a fundamental must-have, but not sufficient to promote two-way knowledge exchange. We also need a new kind of 'Leadership 2.0', which does more than call for increased participation through more channels, but demonstrates that knowledgeing is communication-based – that it involves more than sharing, but also reflecting, muddling and learning, too.

While the project described here is only the beginning and there is much still to learn about designing KM systems as knowledgeing systems, it has so far proved a fruitful and positive start. 

References

1. Recommended reading to learn more about Dr Brenda Dervin's work: Dervin, B Foreman-Wernet, L., and Launertbach, E., *Sense-making methodology reader: Selected writings of Brenda Dervin* (pp. 215-231) Cresskill, NJ, Hampton Press, Inc, 2003;
2. Cheuk, W.Y.B and Dervin, B. (2009). Leadership 2.0 and Web 2.0 at ERM: A Journey from Knowledge Management to "Knowledgeing". In Chu S., Ritter W. and Hawamdeh S. (Ed.), *Series on Innovation and Knowledge Management – Vol. 8 Managing Knowledge for Global and Collaborative Innovations* (pp. 233-254), Singapore: World Scientific.

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