



Knowledge Management at Booz & Company - Toward a Culture of Knowledge Sharing & Collaboration

TEACHING CASE

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INTRODUCTION

In July 2008, Booz Allen Hamilton (BAH) announced the separation of its two core businesses: the U.S. government consulting business, which retained the Booz Allen Hamilton name, and the commercial management consulting business, which continued operations as a new firm, Booz & Company.

After the split, Booz & Company had to redefine its brand, culture, and values to enhance its strength and competitiveness as a globally operating management consulting firm. As one element of its strategy and positioning, Booz & Company's CEO, Shumeet Banerji, challenged the firm to be "foremost in foresight"—that is, to be known for ideas that are both cutting-edge and rigorous. A key part of that strategy was directed toward knowledge management (KM) across the firm. Banerji's vision for the 90-year-old "new" firm stressed the importance of managing knowledge as part of the firm's competitive strategy, to bring the best of Booz's thinking to every client engagement: *"By instilling the concept of capabilities-driven strategy at Booz & Company, our CEO Shumeet Banerji put emphasis on the importance of having a state-of-the-art KM system to capture the knowledge of the firm and to connect experts to deliver the best possible result for clients."* (Matthias Bunte, PhD, partner, August 2008)

Barry Jaruzelski, a partner and head of corporate marketing, approached Adrienne Crowther, a principal with over 10 years of strategy consulting experience and three years developing intellectual capital (IC) for the firm. When Crowther accepted the leadership of Booz & Company's KM agenda, she defined her new role as the director of knowledge sharing and collaboration (KS&C):

- to develop the firm's agenda for instilling a culture of sharing and collaboration,
- to lead the creation and roll-out of a new firm-wide, state-of-the-art KM system,
- to act as an ambassador for improved connection, coordination, and communication to foster innovation across the firm.

In an early discussion with Crowther, Banerji stated that he expected the firm's KM activities to act as a major differentiator, a challenging task in an industry known for advanced KM systems.

One month later (August 2008), Thomas A. Stewart joined Booz & Company as chief marketing and knowledge officer (CMKO). As former editor and managing director of *Harvard Business Review* and best-selling author in the areas of IC and KM, Stewart possessed extensive expertise and was appointed to lead the firm's efforts in the areas of

marketing, IC, and KM.¹ Along with Crowther, Stewart would drive the change needed to foster a culture of KS&C within Booz & Company.

BOOZ & COMPANY – AN INTRODUCTION

In 1914, Edwin Booz founded Booz & Company, the first management consulting firm to provide services and expertise in solving the most important strategic problems plaguing corporations. In establishing his firm, Booz created a new management consulting profession.²

With added partners over the years, Booz & Company became Booz Allen Hamilton (BAH) and evolved into one of the largest, globally operating management consultancies, providing its services to both businesses and governments. Commercial consulting initially outpaced government consulting. In the 1990s, however, the U.S. government began outsourcing significant portions of business. As a result, BAH's government business (much of it outsourcing as opposed to strategy consulting) grew to become four times bigger than the commercial consulting business. Considering its entrepreneurial commercial consulting business and the significantly larger U.S.-centric government consulting business, it became clear that the firm was operating two distinct business models. In 2008, prompted by an offer from The Carlyle Group, the partnership agreed to split into two businesses. As part of the deal, Carlyle assumed control of the government-related business (for US \$2.54bn) that retained the Booz Allen Hamilton name. Booz & Company evolved from the former commercial consulting arm of BAH.

The year 2008 saw the worst economic crisis since the 1930s, with a consulting market contraction of 20-30% and unprecedented overcapacity. Booz & Company, however, stayed on track and proceeded against the strategy articulated by new CEO Banerji to be foremost in foresight and to provide essential advantage to all clients.

Today, Booz & Company is one of the top-tier, full-service strategy consultancies operating on a global scale to face market challenges and create sustainable growth for its clients. It has 60 offices and staff of over 3,300 serving clients around the world. The split provided an opportunity for both companies to resume focus on their respective business models and for Booz & Company to address the question of what kind of firm it wanted to be. There was a need to define the kind of culture that would best help the firm realize its strategic aspirations. At the same time, the new-old Booz & Company faced the opportunity - and in some cases the necessity - to rebuild parts of the firm's infrastructure to serve the new, more focused business. Knowledge Management was one of those opportunities.

¹ Source: [http://www.booz.com/me/home/what we think/40007409/40007869/45080925](http://www.booz.com/me/home/what%20we%20think/40007409/40007869/45080925)

² Source: <http://www.boozallen.com/about/history>

BOOZ & COMPANY – KM HISTORY

Booz & Company builds on a strong heritage in KM. In 1997, BAH was among the first management consulting firms to establish a professional KM system. This system, “Knowledge On-Line” (KOL),³ was a precursor to today’s enterprise content management systems. KOL provided a means to capture, store, and offer searchable access to the firm’s global IC. As KM technology matured throughout the late 1990s and early 2000s, the ability for internal teams to share information via community sites was added. By 2003, the market had again evolved, with portal technology offering a means to bring together enterprise content management and community sites. With the fast-growing government consulting business dominating its KM efforts, in 2004-2005, BAH launched an enterprise-wide portal, “iShare,” that housed KOL, community and team sites, and profiles of partners and staff. Whereas KOL had been widely acknowledged as a success in leveraging commercial business knowledge and expertise, iShare was generally perceived as a step backward due to a number of deficiencies.

iShare, built on the first version of Microsoft’s SharePoint technology, was launched in 2005 at a time when the Internet was undergoing tremendous change. Google Search, social networking sites, and other Web 2.0 applications were emerging and quickly gaining traction. iShare was, from a technology perspective, poorly designed. Its search application was not intuitive and did not yield relevant results, leading to widespread user dissatisfaction. The user interface was also cumbersome, requiring significant training and support. In addition, the platform was slow relative to Internet sites and extensive support was required to develop and maintain team pages. Overall, iShare lacked interactive Web 2.0 functionality which made it distinctly not state-of-the-art. This proved especially disadvantageous for the consultants from BAH’s commercial arm, who missed the simple KOL tool that gave them ready access to information they needed. iShare quickly became an unused, out-of-date, static repository. As a result, staff members had no incentive to use it. Instead, they developed the habit of storing content on their hard drives (rather than uploading it to the system) and searching for content with emails sent to the whole firm asking people to send along documents that might help with a client project. With a highly suboptimal system, email blasts and internal networks became the de facto KM system. This put the firm at risk of overworking junior staff, who lacked strong networks, and of falling behind its competitors due to increased time-to-market when responding to proposals for new client engagements. Knowing that iShare had failed with the commercial business, the newly formed Booz & Company was presented with a unique opportunity to reshape its KM agenda, without the baggage of the BAH legacy systems.

When Crowther stepped into her new role, she knew that she could have a significant impact in helping the firm achieve its goals if she could rebuild Booz & Company’s KS&C capability. While looking forward to the change, a few key questions were heavily weighing on her mind:

³ Source: Galunic, C. & Weeks, J. (1999). *Managing Knowledge at Booz-Allen & Hamilton: Knowledge On-Line and Off*. INSEAD, Fontainebleau, France.

- Would she be able to gain the necessary active senior support given the fact that the firm was in a rebranding and rebuilding mode?
- Could she quickly (re)build a team with the right mix of skills to help her create not only the best tools but also help the firm break with its existing email habit?
- Would she be able to overcome staff inertia to affect cultural change and reach a tipping point of adoption?

Having personally experienced the iShare environment, she knew that she needed to provide the firm with an intuitive system that would make it easier for staff to perform their tasks, otherwise her efforts would be largely wasted.

THE KNOWLEDGE SHARING AND COLLABORATION FRAMEWORK

Setting up the KS&C team

Several characteristics made Crowther a good fit to define and lead the knowledge sharing agenda. As a director, she was positioned high enough in the organization to attract the attention and command the respect of senior leaders. With her experience as a management consultant and time spent in internal positions, she had an extended network across the firm and was known as a highly energetic person with strong communication skills, someone who could get things done.

Crowther's first task was to learn the capabilities of the existing KM team. She inherited a small team of five that possessed KM experience, yet was largely reactive and tactical. While Polly Kahler had almost 20 years of KM experience and knew the history of Booz's KM efforts, other team members focused on building sites and uploading content. The team in general lacked strong project and vendor management skills, user interface expertise, and a full understanding of the everyday challenges of client staff.

Within 18 months, Crowther rebuilt a global and virtual team with a mix of consultative and technical skills aligned to running and maintaining a KM platform, as well as providing excellent KM support across the firm (see Exhibit 1). For technical support Crowther established a strong working relationship with Rick Boulin, the firm's chief information officer (CIO), and Bill DeSalvo, manager of collaboration technologies and the KS&C technology leader.

Launching a global community of practice

In September 2008, Crowther launched a global "community of practice" (CoP) as a forum to test ideas and solicit feedback throughout the design and development of the "Next Generation" (Next Gen) knowledge sharing platform. The CoP grew to well over 100 participants; a mix of client staff from all levels and internal staff from all firm services representing every major region where Booz & Company operated. Membership was open to anyone who was interested. Whenever Crowther received a KM question, she provided the answer along with an invitation to join the CoP. Although members of the CoP did not possess direct decision rights concerning the Next Gen effort, the monthly CoP calls represented important input from a cross-section of the firm when addressing questions about

content, design, tools, and functionality. The CoP was involved in choosing the name insidebooz for the platform and were the alpha and beta testers of the new system. CoP calls were well attended; participants became important ambassadors of the new platform when it launched.

Shaping the Next Gen initiative

With the CoP in place, Crowther proceeded to elaborate the technical and cultural solution and design a launch program for the platform. During this phase, she augmented her team's skills with expertise from two senior associates provided by Booz & Company's IT practice, as well as two European internal professionals from research and learning and development.

The team established a KM framework (see Exhibit 2) as a guide, which encompassed:

1. strategy
2. process
3. organization
4. technology.

(1) Crowther built the team's strategy around four KM value propositions aligned to the business: *respond*, *connect*, *collaborate*, and *innovate* (see Exhibit 3). First and foremost, the new system had to respond quickly and effectively to client demands and allow consultants to get up to speed rapidly by leveraging existing IC. Second, it needed to act as a facilitator for Booz staff to connect with each other and the firm's experts, thereby enhancing and extending the existing internal network of staff around the globe. Third, it had to encourage collaboration, the building of communities, coming together, and sharing of ideas and content to provide fluidity across the firm globally. Fourth, it needed to foster innovation via online forums and expert communities. Collectively, these value propositions focused on creating essential advantage for clients by sharing and highlighting best content.

The initial focus centered on developing effective respond and connect aspects. Crowther and her team planned to make KS&C part of the firm's DNA not only by fostering the development, capture, and dissemination of high-quality, ready-to-use IC, but also by always linking content to people, with the intent of putting people at the center and encouraging new connections. This would improve efficiency and consistency as well as minimize legal, regulatory, and economic risks. In the long term, the platform needed to encourage increased innovation, especially by promoting expert networks and entrepreneurship across the firm. By enabling a culture of KS&C to drive innovative market-leading foresight, the system would allow staff to fully leverage the firm.

(2) Looking at the firm's processes, Crowther and her team realized they had to approach the initiative from a perspective of how Booz staff already operated. Rather than create a whole new set of processes around KM, they wanted to embed sharing and collaboration into the

consulting engagement life cycle (see Exhibit 4) by developing a simple, easy to use portal for consultants.

As part of the firm's business processes, the KS&C team acknowledged that the Next Gen platform would be only as good as the content and information it provided. Thus, they saw the need to introduce four processes, two aimed at getting ready for launch and two aimed at maintaining relevant content:

1. Launch a new firm-wide people expertise system
2. Develop a backfill process to collect existing shareable content (currently on hard drives)
3. Establish an ongoing process to collect end-of-engagement IC
4. Include updating resumes and expertise information in the annual appraisal cycle to ensure that the most relevant staff information is always on insidebooz.

(3) In terms of the organization, Crowther and her team focused on a number of themes. First, it was crucial to ensure top-down support and strong senior sponsorship at the firm, regional, and practice levels from senior leaders who could "walk the talk." KS&C was reinforced and became a key theme in Banerji's quarterly firm-wide chalk talks. In addition, senior partner Niko Canner became an executive sponsor and counseled Crowther and her team. At the local level, the KS&C team focused on a number of bottom-up concerns: guidelines, templates, training on knowledge-sharing best practices, how to collect and upload backfill content, and how to deploy engaging team sites. Crowther worked with regional and practice leaders to name senior staff to be responsible for each team's knowledge agenda. She then provided a single point of contact on the KS&C team, with the intention of building strong relationships between client staff and her team.

(4) Based on experience with the former KM system, DeSalvo and Crowther developed a set of principles that shaped the technology decisions they had to make for the new portal. In addition to speed for launching the new system (to minimize penalties to Booz & Company for using the BAH platform), the portal needed to be hosted in order to avoid costs and complexities of in-house hosting and support. The team also sought a solution that would require a minimal degree of customization and that was, easy to operate, maintain, and avoided complications for future releases. By seeking a centralized, firm-wide, unified platform that delivered a suite of functionality instead of a collection of point solutions, DeSalvo hoped to minimize custom development and integration requirements.

Throughout the Next Gen process, Crowther provided regular updates to the CoP and Stewart and occasional updates to the firm's executive committee. She engaged in more frequent communication with the knowledge and marketing advisory committee (KMAC), a governance body composed of client-facing partners providing senior sponsorship and advising the KS&C team on strategic matters. With the split from BAH, the KS&C team was aligned with the marketing organization, providing clear links to senior sponsorship. In contrast, the prior KM team within BAH had been reporting within the IT team. As long-time

KM team member, Polly Kahler emphasized: *“When we aligned with the marketing organization we could see that our CMKO understood the inherent benefit of knowledge sharing. We now had direct support from the KMAC up to the CEO.”* (December 2008)

Refining the requirements of insidebooz

Equipped with the overall requisites (i.e., KM framework), Crowther and her team began to further define the technical requirements for the Next Gen solution, which came to be called insidebooz.com. Four workstreams geared to requirement gathering were initiated, including the identification of staff needs, external benchmarking, internal baselining, and a vendor review for the technology solution.

In October 2008, two user design workshops were conducted, one in the U.S. and one in Europe. The results revealed central insights into what the firm lacked in terms of KS&C and what would enhance the daily work of consultants. Questions addressed included: What content do you need to be more efficient in your work? How might you rate the quality of content? What should the process of capturing content look like? How do you find and connect with experts? How might technology make this easier? The KS&C team also conducted interviews to learn of competitors’ activities and carried out a firm-wide survey on KM topics. One in three employees responded and provided excellent feedback for designing insidebooz. To provide real value to the firm, the Next Gen system would need a significant amount of relevant, high-quality content linked to topic expert(s). A process to continually update knowledge and to make experts visible to others had to be developed.

As part of the internal baselining, the team also took a close look at former internal KM initiatives. One hypothesis on why prior initiatives did not reach their full potential was that the business did not stay involved through the entire process (IT took over at the design stage), coupled with a general lack of attention by senior staff to central KM topics. The rebuilt KS&C team was dedicated to develop, design, launch and maintain the new platform. The team faced many challenges along the way, starting with the difficult task of translating business requirements into technical functionality.

In preparation for working with developers on the customization of the platform, approximately 50 detailed use cases were created by November 2008. These business scenarios enabled consultants to describe what they wanted to happen without initially indicating how it was to be accomplished. DeSalvo summarized the advantages of use cases as follows: *“There are a lot of different ways to collect requirements for a system but what is paramount is knowing the business requirements. We created scenario based use cases to give a holistic view of what needs to be accomplished not just by the system but also by the people using the system.”* (October 2008)

That same month, November 2008, another milestone was reached. After a thorough vendor review, the KS&C team chose Microsoft SharePoint 2007 as its platform technology. SharePoint was a broad collaboration suite that would require some customization, but did not

require cobbling together a number of best-of-breed solutions. In addition, it integrated well with the firm's other Microsoft-based products.

Defining the look and feel of insidebooz

Danielle Phaneuf, a senior associate from the IT practice, joined the KS&C team in full capacity from October 2008 through March 2009, later maintaining an advisory role. With experience in leading IT-related projects, she acted as the project manager for building the portal and supervised development and system design. With no internal Booz & Company developers, the entire look and functionality of the system was contracted to outside developers who began their work in January 2009.

The KS&C team defined the look and feel of the portal with a set of Intranet best practices in mind (see Exhibit 5). They wanted to create an easy to use and graphically pleasing website, according to the brand guidelines of Booz & Company. The site needed to be engaging while providing access to the appropriate people and content.

- The homepage (see Exhibit 6) provided rotating feature stories to keep staff up-to-date on Booz & Company activities; a blog spot focused initially on knowledge themes, with the long-term goal for a management blog to all staff.
- At the top of every page users could easily access their Profile (where their expertise and resume information resides), upload documents, search, and obtain help.
- Team and community sites (see Exhibit 7) offered the ability to build collaboratively on existing content.
- Search provided the ability to preview documents as well as see related content and the team that worked on the engagement.
- Document upload (see Exhibit 8) was easy to use and placed the uploaded document in the right place taking any guesswork out of the process.

Working with outside developers presented numerous challenges and delays. It quickly became clear that the SharePoint user interface would require significantly more customization than the team had expected. The team was being forced to choose between two of its guiding principles: the need for a user-friendly platform vs. the need for minimal customization.

With the fate of iShare fresh in memory, the team had little hesitation in putting users first.

Even with strong project management, difficulties involving customization of the platform led eventually to a delay of the projected launch of insidebooz, from spring 2009 to early autumn 2009.

Defining a firm-wide taxonomy

Despite the delay, another milestone of the initiative was marked with the final determination of a firm-wide taxonomy in June 2009. Again, Crowther cooperated closely with the senior leadership of the firm. As opposed to previous KM initiatives, it was the first time the firm

established a consistent taxonomy that would integrate across finance, human resources (HR), and KS&C.

Pearl Nartey, who left client work in 2009 to join the KS&C team, identified the benefits of consolidating the taxonomy: *“After each practice and function had come up with their preferred taxonomy, we as the KS&C team worked with each team to ensure consistency and to map the old taxonomy to the newly defined one. Before, we used to have different taxonomies across different regions, across how we rolled up our business and how we thought about content and expertise. Now this is completely aligned. Without that it becomes difficult to know how to identify and search for information.”* (June 2009) Ultimately, the taxonomy served as a map for the whole portal.

As the firm’s taxonomy continually evolved, Crowther worked with the finance team to put a process in place to ensure that any changes were approved across all regions and made to the HR, finance and knowledge systems concurrently, with the end result of creating a globally consistent language to define the firm’s areas of expertise.

Preparing for launch

Encouragement

In spring 2009, Crowther worked closely with the director of human capital to revise the appraisal form for junior staff. As Stewart stated: *“If you want people to use the system, you make using the system something that they are measured on for their performance and in their rewards. Measurement must be on not only if they use the system but also if they add to the system.”* (June 2009)

Now, during the annual appraisal process, client staff are required to check if they recently updated their resumes and profile/expertise on insidebooz. They are also assessed against the competency of collaboration and knowledge sharing. Rather than a quantitative assessment measuring the number of documents submitted, staff are qualitatively evaluated on their abilities to leverage experts and content.

Content

A golden rule of intranet adoption is that content is king. Without robust content, staff would search for something, become discouraged, and not return. A core value proposition of insidebooz was to enable staff to respond to client demands quickly to develop strong proposals as well as to find relevant content when starting an engagement. Thus, everything from previous proposals, staff resumes, standard qualification slides, frameworks, and methodologies from prior engagements needed to be readily accessible. Nartey was tasked with leading a comprehensive content backfill initiative. As she stated: *“Because we’re a knowledge firm, our portal is only as good as the content on it. We realized that we needed to do a lot of work to start collecting content that was now on hard drives. Structuring the process to do mass content collection across all our industry and functional teams was nontrivial.”* (January 2009)

For this to be successful, a clear process had to be set up to define the major steps to be taken by each practice. Crowther, worked with practice leadership to obtain approval and support for the effort. Nartey quickly established a process to gather relevant existing content that had not been uploaded to the previous KM system in the past three years. Each practice then named a knowledge liaison (and team) to work closely with a member of the KS&C team to collect and tag content from its practice. This also involved identifying the elements of the firm-wide taxonomy that matched each document. With content collected, Nartey developed a process for sanitizing the documents (i.e., removing client-specific data) and uploading them to insidebooz.

It was a formidable challenge for the KS&C team to mobilize and motivate the necessary resources in the practices to drive the backfill effort. The process took longer than the team had planned; however, by late summer 2009, the KS&C team had accomplished a great success in collecting, tagging, sanitizing, and uploading a few thousand documents.

Engaging sites

Adding to the complexities of gathering existing content was the integration of Katzenbach Partners, a New York based consultancy that had been acquired in January 2009. With this acquisition, Booz & Company complemented its knowledge and skill base in the domain of organizational performance. For the KS&C team the challenge lay principally in finding a way to effectively integrate Katzenbach's IC and KM experiences. Katzenbach was much smaller than Booz & Company but had recently developed a home-grown cutting-edge KM system, "HUB+."⁴ HUB+ was particularly advanced in the use of informal KM tools, such as wikis for team sites, user-selected best bets in search, cloud tagging, and a folksonomy rather than a formal taxonomy to help staff in uploading and finding documents. As a smaller firm, Katzenbach could use client names as the organizing construct.

HUB+ deployed many Web 2.0 features, and the client-based organizing construct worked well for Katzenbach. However, Katzenbach had different contractual agreements with its clients than did Booz & Company and, as a larger firm, Booz & Company required more formal policies on document sanitization. This required a very different system from Hub+, one that felt more cumbersome to former Katzenbach employees. Crowther was faced with the question of how to integrate the Katzenbach content in an engaging way.

As part of the acquisition, Booz & Company established a think tank, The Katzenbach Center, an innovation engine in the areas of organization, leadership, culture, and human capital. Ilona Steffen was named director of the center. Steffen had also been instrumental in creating the Booz & Company taxonomy. With the impending insidebooz launch, Steffen saw a great opportunity to showcase the best of the Katzenbach Center content. She organized a team to screen the legacy Katzenbach Partners knowledge system, focusing on best bet materials.

⁴ Source: Burgelman, R. A. & Blumenstein, B. (2007). *Knowledge Management at Katzenbach Partners LLC*. Stanford Graduate School of Business, Stanford.

Over 350 documents were chosen, which were transformed into the standard Booz & Company format and uploaded to insidebooz.

To showcase this content, Steffen and her team worked with the KS&C team to adapt HUB+ collaboration tools, starting with a wiki-based site for Katzenbach content that was easy to navigate and update. Leveraging former Katzenbach consultants side by side with Booz consultants, the team created what would become the best practice way of sharing topic specific content: they created an engaging site, highlighting “best of” and overview content, showcasing training videos, and organizing content by need (marketing, proposals, starting an engagement) (see Exhibit 9). The Katzenbach Center wiki site became a showcase site. This was a turning point for the KS&C team. The wiki-based site was a place where knowledge could not only be stored, but also highlighted, shared, and even created.

This approach was significant in embodying the vision of Booz & Company to become innovative thought leaders on a wide array of topics. By supporting and extending the creation and development of IC, the Katzenbach Center demonstrated a best practice example for other practices in the firm. Soon, other teams wanted to highlight their best content via a similar wiki format.

Connections

In late summer 2009, with the impending launch of the portal, Stewart and Crowther decided to pre-launch the My Profile functionality. In addition to having robust profile data filled in for the formal launch, they could also generate interest and buzz within the firm. Even though the platform did not support the latest in social networking or microblogging, with My Profile, staff could indicate their expertise using a three-star rating scale, upload their resumes in a standard format, and enter their personal data (see Exhibit 10). Profiles could also be auto-populated with information including general detail (name, phone, assistant), authored content, and engagement history.

In addition to creating excitement around the initiative, My Profile served as a powerful tool that allowed staff to connect with experts in the firm. Staffing for an engagement would be largely facilitated with resumes online and highlighted areas of expertise. With access to profiles, staff would be able to search for people by office, skill, and level and view photos, resumes, and contact details. At the time of launch, over 60% of staff had filled out their profiles.

LAUNCH OF INSIDEBOOZ AND FIRST EXPERIENCES

Throughout August and September 2009, Stewart sent out four emails containing links to fun videos based on the pillars of insidebooz: respond, connect, collaborate, and innovate. These short videos built excitement and increased awareness of the new KM platform that was soon to be launched. In October 2009, insidebooz went live.

Booz & Company's CEO Banerji sent out the launch email, welcoming staff to leverage insidebooz, the firm's next generation knowledge platform intended to pave the way for a new approach of working and collaborating in the firm. Emphasizing the new functionality of the system and the great work of the KS&C team, he also pointed out that, although important, this effort was only a first step. To further enhance the firm's KS&C capabilities, Banerji stressed the need to use the system on a daily basis, to modify business practices, and to align incentives. This email was followed by a series of webinar-based "Getting Started" sessions; executive endorsement was provided when Crowther was asked to give a live demo of the platform at the worldwide partner meeting in December 2009.

Initial feedback was mainly positive. Steffen stated: *"I have high hopes that insidebooz will catapult us into the league of the absolute best practice in the world of KM. I think we were there a few years ago, and then we lost momentum. With insidebooz I think we're on the trajectory to be right up there again."* (June 2010) Ezzeddin Zahzah, an associate who had joined the KS&C team in April 2010, praised the community aspect of the new system: *"Insidebooz is not just a repository for our firm's IC; besides the thousands of documents and useful content it hosts, its community sites and interest groups are designed to facilitate knowledge sharing and collaboration across our teams and regions."* (June 2010)

Exemplary of many users of the new system, Bunte, a partner from the Health practice, emphasized: *"We have created a system which is state-of-the-art and very functional. insidebooz goes far beyond being a document management system - it is more a 'connection system' that connects people, content, and methodology."* (June 2010)

Insidebooz now faced two key challenges: (1) Performance was surprisingly slow; it took too long to navigate from site to site or to get results from a basic search. (2) The firm was still a long way from reaching a tipping point of mass adoption. Not enough new content was being put on insidebooz, and (because the system was new) there were few people who used insidebooz as a matter of habit. As a result, client staff continued to either reach out to their known internal networks, or send a global email asking for content. Steffen summed up the type of behavioral change that Crowther and Stewart were going to need: *"Full adoption will mean that using insidebooz becomes standard behavior, a standard way of conducting your day to day business. Just like I do, I go there every morning. I look at what's on the homepage every day, I read the stories. Whenever I need something I go there first before I call somebody or ask somebody else. It becomes a tool that everybody uses every day."* (June 2010)

Looking back, Stewart thought: *"It could still fail. But the indicators of success will be that we see a steadily rising percentage of content on insidebooz from closing engagements along with steadily increasing usage stats."* (July 2010)

Crowther realized that she would have to find ways to demonstrate the inherent value of the system to support staff success within Booz by connecting to experts or by finding relevant content. As Stewart emphasized: *"KM does not substitute for networks. It automates them, it provides substance to networks, and it helps you grow your network faster."* (July 2010)

THE SITUATION TODAY AND LOOKING AHEAD

About two years into the initiative, Crowther and her team had spent enormous effort creating a KS&C solution that was intended to enable the foresight agenda of the firm, decrease time-to-market, and increase innovation and entrepreneurship.

Crowther and Stewart focused on three areas:

1. Ingrain insidebooz into the culture of the firm: find ways to change specific behaviors and embed insidebooz into the everyday processes of Booz & Company.
2. Build high impact sites with deep ready-to-use content; with the Katzenbach Center wiki as the model, Crowther's team would be able to show other teams a best practice example.
3. Develop a clear set of metrics to show progress and to monitor the firm's performance against each of the KS&C value propositions.

Initially, the technical performance of insidebooz represented a significant barrier to use. CIO, Boulin launched an initiative to find what was causing the performance issues, set a goal for acceptable performance level (in terms of page load speed), and solved the performance issues.

Addressing widespread adoption was a more complex issue. Concurrent with the launch of Booz & Company, the firm embarked on a major culture initiative. One outcome was *Project Closed Loop (PCL)*, a project management tool launched in early 2010 to support team effectiveness while driving extraordinary client impact. PCL consisted of a series of conversations throughout the life cycle of each client project that was designed to help teams set expectations and goals for client impact, individual team member development, and firm impact (see Exhibit 11). Crowther worked closely with the culture team to ensure that PCL encouraged staff to embrace insidebooz, leveraging content at the start of engagements and providing content after an engagement. Using guides and templates, PCL showed staff how to close out engagements and capture relevant content. *"It's a process for making sure that the right kinds of dialogue happen at every part of the project; for example, at the beginning of an engagement we need to talk about what content already exists that can be leveraged. At the end of projects teams reflect upon the results delivered to the client and how the Booz team can best capture knowledge for the firm."* (Caroline Kronley, culture team member, June 2010).

To track the progress of PCL and knowledge sharing in general, Crowther and her team developed quarterly *knowledge metrics*. Metrics were provided at the firm, regional, and team levels, they focused on content collected from closed jobs, profiles and resumes updated, and overall usage. Crowther began sending quarterly metric updates to the executive team, regional leaders, and practice leaders with one-on-one follow up conversations to discuss how teams could actively improve their knowledge sharing. Where possible, she tried to spark competitive fires, challenging laggard practices to rise to the performance of leaders. On most accounts (number of sites, usage, resume and profile updates) the metrics showed strong

positive momentum; however, the majority of post- engagement content was still not being sanitized and uploaded to insidebooz.

Crowther and her team remained focused on overcoming the challenges of getting staff to sanitize and upload more content to insidebooz. Crowther continued to have close communication with the global practice leaders, KMAC, and culture team. Although senior leadership understood the importance of knowledge sharing, there remained a lack of active support in terms of leading by example and holding teams accountable, as suggested by PCL. Change is an evolutionary process and takes time to be fully integrated in the firm's DNA, especially since Booz & Company was a large and globally operating firm. Initiatives such as PCL demonstrated a considerable step in the right direction to embed new behavior in the firm.

Crowther and her team knew that what had started out as the Next Generation initiative would be an ongoing evolution. The market was quickly evolving and changing how people used technology to interact with friends and colleagues. Already Crowther was investigating how to incorporate social networking and smart phone apps into the current platform. New features and functionality, however, did not present the biggest challenge. The KS&C team remained focused on communicating and promoting a consistent set of KS&C behaviors that would lead to the adoption of insidebooz; if successful, they would have built a differentiated capability for the new Booz&Company.

Appendix

Exhibit 1: Supporting KM across the firm – the KS&C team service offerings

Knowledge Sharing and Collaboration Team Charter	
<ul style="list-style-type: none"> • Promotes knowledge sharing and collaboration agenda across the firm • Oversees the design, launch, maintenance, and upgrading of the knowledge infrastructure • Facilitates connections, coordination, and communication across the firm 	
Consultative Services	Technical Services
<ul style="list-style-type: none"> • Provide teams with Knowledge Liaisons to help rebuild a culture of sharing and collaboration <ul style="list-style-type: none"> - Work jointly on developing team specific knowledge sharing strategies - Build best in class collaboration team sites and provide UI support - Encourage new processes and the use of web 2.0 applications such as blogs, wikis • Provide quarterly firmwide knowledge metrics • Train the firm on best practice use of insidebooz • Communicate new features and processes to the firm 	<ul style="list-style-type: none"> • Manage and maintain the Sharepoint 2007 platform that insidebooz is built upon, as well as all other knowledge sharing tools • Ensure that insidebooz.com has a high performance level • Address platform bugs and feature enhancements • Provide ‘basic’ team sites to engagement and account teams • Maintain (along with Finance) the firm’s taxonomy • Manage large scale data migration, content backfill, and updating efforts • Maintain an ongoing ‘platform/product’ roadmap • Manage outside contractors for platform fixes and improvements

<ul style="list-style-type: none"> • Ensure that insidebooz content is relevant and up to date • Work with staff to understand improvement needs 	
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Exhibit 2: Next Generation KM Framework

- Objectives
- Targets/Milestones
- Key Performance Indicators
- Funding
- Leadership Support and Communication

- Governance
- Organization
- Roles and Responsibilities
- Rewards and Incentives
- Adoption



- Generating
- Capturing
- Organizing
- Developing
- Distributing
- Link into Existing Processes

- Content Management Interface
- Communications Infrastructure
- Data Repositories
- User Functionalities

Exhibit 3: The KM Value Proposition



Knowledge Sharing Embedded into The Engagement Lifecycle

- ♂ **RESPOND:** Quickly find relevant resumes, quals and content for rapid proposal development and engagement on -boarding
- ♂ **CONNECT:** Find and connect with colleagues who have relevant knowledge and areas of expertise
- ♂ **COLLABORATE:** Build practice, regional and other communities by providing useful content and information that leverages our global nature
- ♂ **INNOVATE:** Drive thought leadership by sharing and leveraging cutting edge insights and expertise that result in the best solutions for our clients

Exhibit 4: The Consulting Engagement Lifecycle

Capturing Knowledge and Sharing Ideas

	Marketing	Proposal	Engagement	Post-Engagement
Content Created/ Required	<ul style="list-style-type: none"> <input type="checkbox"/> Business Intel <input type="checkbox"/> Industry Research <input type="checkbox"/> Client Background <input type="checkbox"/> White papers / Points of view 	<ul style="list-style-type: none"> <input type="checkbox"/> Proposals <input type="checkbox"/> Quals <input type="checkbox"/> Resumes <input type="checkbox"/> Frameworks/ Approaches 	<ul style="list-style-type: none"> <input type="checkbox"/> Engagement how - to guides <input type="checkbox"/> Practice toolkits and manuals <input type="checkbox"/> Frameworks / Approaches / Models / Tool kits 	<ul style="list-style-type: none"> <input type="checkbox"/> New offerings, frameworks, approaches <input type="checkbox"/> New whitepapers and points of view <input type="checkbox"/> Sanitized proposals, documents, quals, etc.
Collaboration Needs	<ul style="list-style-type: none"> <input type="checkbox"/> CRM insights - historical views 	<ul style="list-style-type: none"> <input type="checkbox"/> Find Experts <input type="checkbox"/> Find Staff 	<ul style="list-style-type: none"> <input type="checkbox"/> Find Experts <input type="checkbox"/> Collaborate with team members 	<ul style="list-style-type: none"> <input type="checkbox"/> Build Regional / Practice Offerings <input type="checkbox"/> Build Communities

Exhibit 5: Intranet Best Practices

Intranet Best Practices
<ul style="list-style-type: none"> • Put people (not content or technology) at the center • Integrate into the business • Provide universal access (e.g., single sign on) • Create seamless enterprise experience – one place for info, people, and content • Support cross-boundary interaction • Keep it simple and easy to use • Make it visually appealing

Exhibit 6: insidebooz homepage

The screenshot displays the insidebooz homepage with the following elements:

- Header:** "booz&co." logo, navigation links for Teams & Communities, About Booz, Firm Services, Marketing & Comms, and Wikis & Blogs. A search bar is also present.
- Employee Directory:** A search form with fields for "First name:" and "Last name:", a "Find" button, and a link to "To find people by alignment or office, click here." Below it, "My Stats" shows: Skills last updated: 12/7/2010, Resumes last uploaded: 1/26/2011, and Timesheet submitted: Yes.
- Feature Story:** "THIS WEEK'S FEATURE STORY" titled "Employee Directory" with a description: "Do you need to find someone at Booz & Company? Use our new searchable Employee Directory! Search for an individual, a team or an entire office, then sort your results!" and buttons for "Read more" and "View Archive".
- My Toolkit:** A list of links including Advanced Search, Employee Directory, eTime, Firmwide Calendar, Firmwide Ethics Hotline, My Identity Manager, My Posted IC, My Posted Chats, My Training (Register for Courses), Office Toolkit, Project Closed Loop, PSR Online, Useful Links, and travelalerts@insidebooz.com.
- What's Hot! on insidebooz.com:** A section with icons and titles for: Who's Who & How-To, Capabilities-Driven Strategy, IC Storefront, Employee Directory, New Bookings Tool, and Project Closed Loop.
- SPOTLIGHT:** "New Interactive Locations/Offices Site" with a world map graphic.
- Who's Who and How-To at Booz:** A profile picture of a woman and a short bio: "I'm not sure why its so hard to figure out who does what within Booz firm services, but for some reason - maybe because we all have the same titles - it is. So, in an..."

Exhibit 7: Example team site

Welcome Adrienne | My Profile | Tools & Help | Submit Documents | Search

booz&co. Teams & Communities | About Booz | Firm Services | Marketing & Comms | Wikis & Blogs

insidebooz.com » Teams & Communities » Industries » Consumer & Retail

Consumer & Retail
 C&R Home
 About C&R - Consumer Products
 About C&R - Retail
 C&R Knowledge
 C&R Meetings & Events
 Team Overview

Welcome to the Global C&R Team Site!
 Dear colleagues,
 We are proud to welcome you to our new Global C&R Central Collaboration Platform. Acquiring knowledge in the marketplace, sharing it with our teams and applying this to new client situations is one of the crucial success factors of our business... read more>>

MEET OUR LEADERS!
Paul Leinwand
 CMD/C&R - Chicago
 Paul is a partner in the Chicago office and is part of the global consumer, media and digital team. He co-leads the Firm's platform and campaign on Capabilities Driven Strategy (CDS)

USEFUL LINKS
 Media Team Site
 IC Research
 Client Account Sites
 External News: Flex News Food
 External News: Just Food
 External News: Just Drinks
 C&R Europe QBR - Rome Oct 2010
 Consumer Practice Overview (PPT)

RECENT IC
 Capabilities-Driven Integration of Food Business
 (In Japanese) Entry Strategy to Leasing Market in China
 (In Japanese) Proposal regarding Entry Strategy to Leasing Market in China

Booz - C&R s+b
The E-Commerce Imperative for Traditional Retailers: Letting Go of Old Conventions
 This Perspective explores how traditional bricks-and-mortar retailers need to adjust to succeed in the e-commerce space, in particular by letting go of old conventions. read more >>
Standing Up a Cloud-Enabled Marketing Capability
 In the new era of the cloud—together with the expected explosion in connected devices and the dynamic applications optimized for them—information can be continuously fed to cloud-enabled “big data” and analytic engines, opening up the promise that all of marketing could... read more >>
Motivating Behavior Change: Boosting Performance by Mobilizing Pride Builders
 Organizations should follow a rigorous approach to determine who the Pride Builders are, and then build on their insights and capabilities to influence behaviors. Pride Builders can be helpful allies in spreading both motivational behaviors and performance behaviors. In practice

CURRENT FORESIGHT
 Restructuring in Consumer Products highlights the importance of organizing product/service portfolios and M&A strategy

Exhibit 8: Document upload

Submit Documents

Select Content Type » Select Engagement » Upload Documents » Provide Details » Submit Documents

I am uploading:

- Legal Record(s)
- IC, Thought Leadership
- Internal Firm Document(s)
- Engagement Qual(s)
- My Resume(s)

Cancel Previous Next

Exhibit 9: Katzenbach Center wiki site

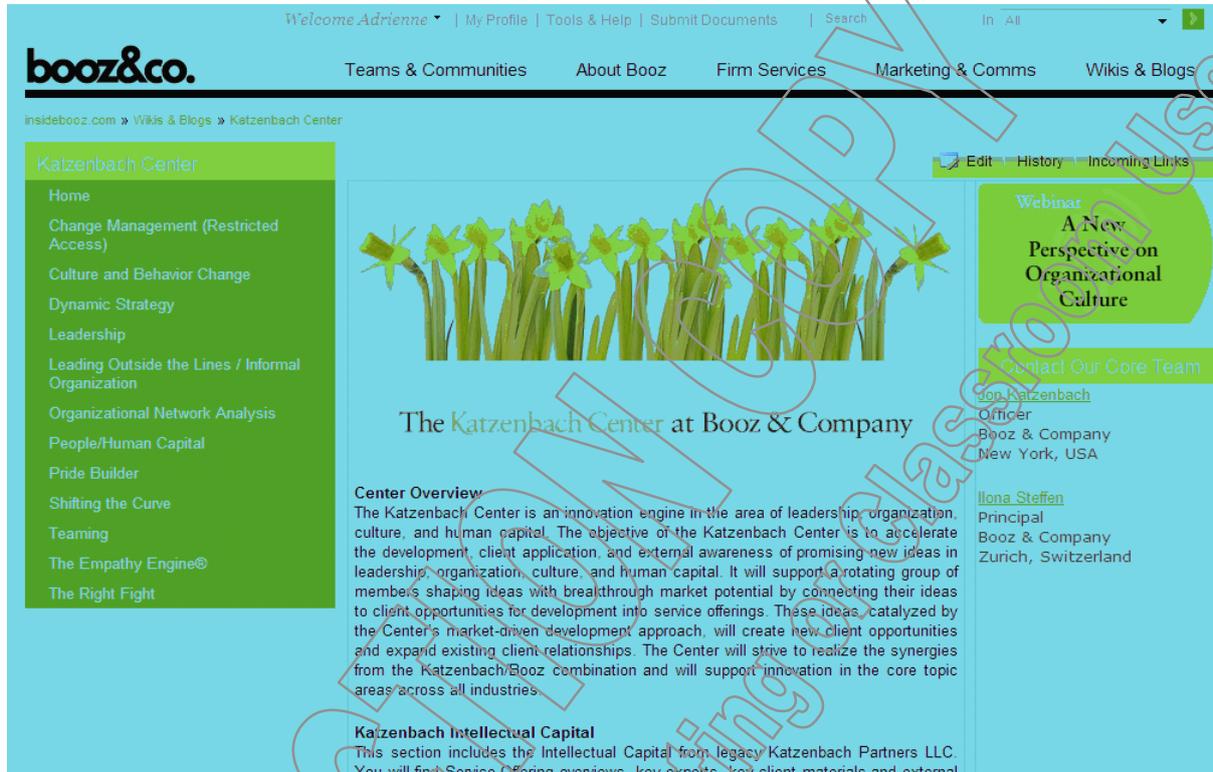


Exhibit 10: Screenshots: 'My Profile'



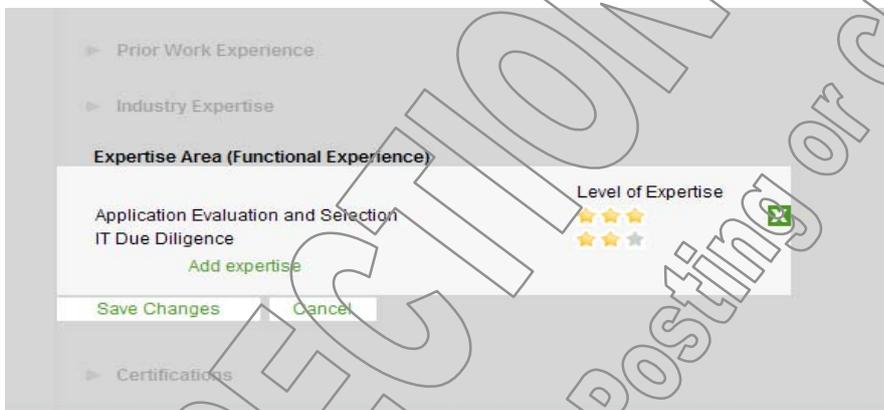
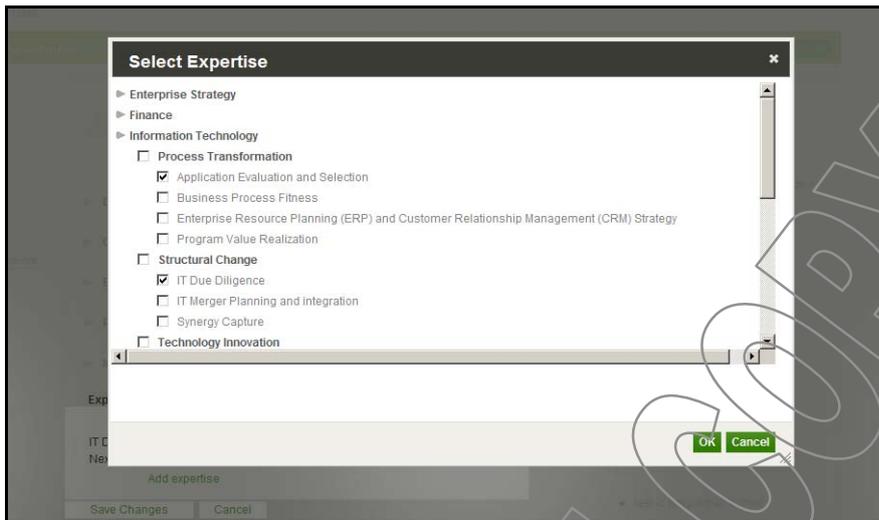


Exhibit 11: Project Closed Loop

Project Lifecycle			
Project Launch	Ongoing Project Delivery	Project Mid-Point(s)	Project Close-Out
<ul style="list-style-type: none"> • Kickoff session for project about what success looks like for client, firm, and each individual; mutual expectations; how we will live the aspirations; and how to keep dialogue open about these goals during the work itself • Dialogue around relevant IC – what knowledge can be leveraged, where are there knowledge gaps, and how might they be filled • 1-on-1 expectations conversation between associates and job manager 	<ul style="list-style-type: none"> • Regular ‘on-the-job’ feedback with team members after critical meetings and deliverables 	<ul style="list-style-type: none"> • Team check-in to collectively assess team performance against vision, client impact standards and aspirations discussed during kickoff • Team touch-point on knowledge – are firm experts being utilized to the fullest, has IC been created that should be shared with the firm? • 1-on-1 feedback to each team member 	<ul style="list-style-type: none"> • Close-out conversation to close the loop on project kickoff • Make decisions on knowledge capture: develop quals, sanitized high value IC and upload to insidebooz, comment on existing IC on insidebooz, update profiles and resumes as appropriate • End-of-project review conversation with each team member