

## **Building a Transformative Network: IBM Virtual Learning Community Case Study**

Group Jazz supports the work of groups, whether they meet face-to-face, online, or both. We bring together the best tools, technologies, media, and PEOPLE to produce great group experiences with powerful results. The following case examples describe a series of projects in which members of the Group Jazz team worked with a team at IBM to produce web-based community initiatives.

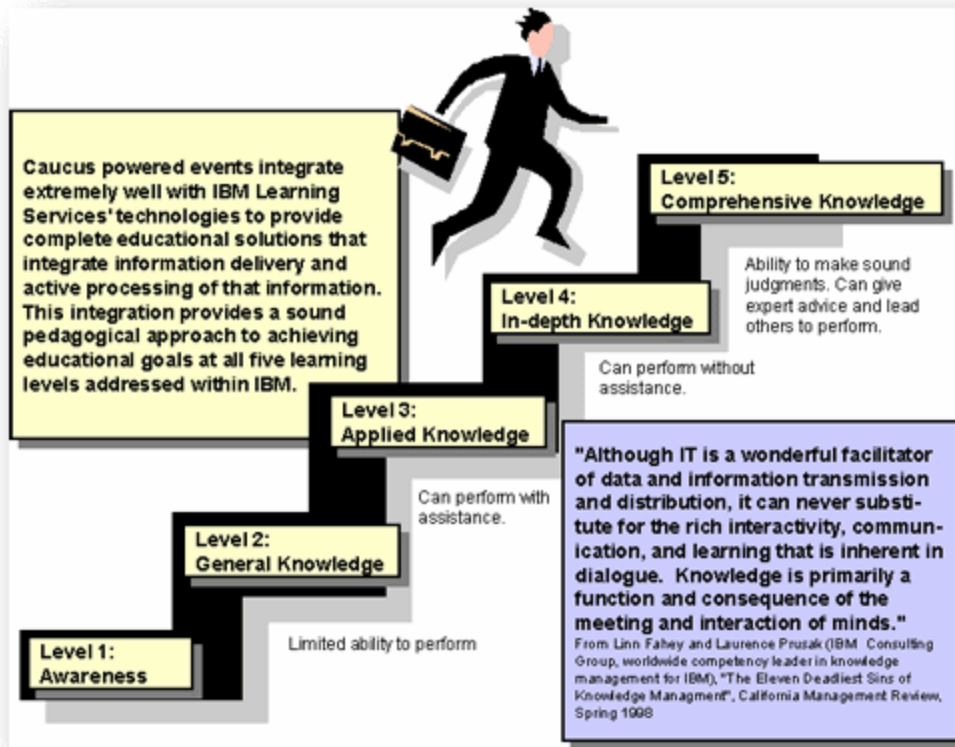
### **Introduction**

The current organizational environment is fast paced and global which makes time available for travel and on-site meetings increasingly scarce. IBM has developed key business processes that employees know and count on to ensure high quality and consistent delivery to clients. Group Jazz creates structured conversational environments that “virtualize” those key business processes. We can create learning communities that are new yet still retain some familiar ground and create virtual learning communities that keep participants connected and engaged in the right conversations!

The generic term "event" is used to describe the project examples: one was a forum for an exchange of ideas amongst a knowledge management team to develop and unify common business unit strategies; one was a skills and learning seminar of best practices to highlight skills and reinforce applied learning from the conference during the year; and one was an annual sector sales kickoff to celebrate the previous years successes and educate participants on the critical path for the coming year. In each these projects, we worked in partnership to create virtual events that would include the same things expected at face-to face offsite meetings: plenary sessions, workshops, a resource center, a cafe for informal chat and networking, etc. Each event had a unique purpose, audience and anticipated outcomes.

Presentations, questions & answers, and interactive dialog remain accessible throughout the entire event. The Group Jazz web-based environment remembers exactly what participants have seen and prompts them to view new material each time they log in. Using a "ready room" within the web-based environment, we coached presenters, domain experts, and facilitators in the best way to present their materials and integrate structured discussions to achieve event outcomes. We took presentations and adapted them to the event environment as required.

Throughout production we looked for metaphors, common best practices, familiar images and icons, fabled stories, IBM specific "nicknames" and patterns that participants would recognize. Realizing that a virtual learning community will be new to most participants, finding common ground as a starting point is key to engaging participants in meaningful ways.



## Virtual Learning Communities

*"Many companies today are becoming keenly aware of how central knowledge and learning are to maintaining their competitive advantage. But to leverage knowledge for competitive advantage involves far more than building knowledge repositories, sharing best practices, or increasing the role of corporate education. These common knowledge management approaches take a very narrow, static view of knowledge and can at best only deal with existing knowledge.*

*To truly leverage knowledge for competitive advantage, it is not enough merely to capture the knowledge that was important in the past. You also need the capacity to retain this knowledge in a way that has sustained relevance; and you need the capacity to build new knowledge, the knowledge that will be important in the future. One way to do this is to foster learning communities that own, organize, share, develop, and create knowledge."*

*Etienne Wenger and Richard McDermott from a workshop, Learning Communities: The Ecology of Knowing, delivered online at Knowledge Ecology Fair 98.*

As companies today are more global reaching, creating thriving and effective learning communities company wide becomes increasingly challenging. The advantage of the Internet is that it creates a way to connect people across space and time. The key to the success of an Internet based community is an understanding of the human components and creative design which supports a positive networking experience.

## Case Example: Building Virtual Communities

Creating a virtual learning community is an evolutionary process that recognizes a need for systematic changes over a period of time. We have found that keeping the process embedded in already familiar patterns has been extremely effective.

Attendees at virtual events were able to find some of the same things they could at face-to face offsite meetings: plenary sessions, workshops, a resource center, a cafe for informal chat and networking, etc.

Participants attended an event by logging into the password protected event environment from any web browser, at any time of the day or night. While some sessions were synchronous (everyone must attend at the same time); most are asynchronous (scheduled over a period of time such as a week), allowing participants from all over the globe to attend any time they want. Presentations, questions & answers, and interactive dialog remained accessible throughout an entire event.

Participants were able to realize the following benefits:

- access the educational sessions they need to perform their jobs;
- join the activities from all industries and geographies within IBM;
- engage with each other and find out how colleagues with similar circumstances and conditions were applying the same materials;
- “speak” directly to a presenter and ask in depth questions about their presentations to directly benefit their personal situation;
- learn at their own pace;
- network and share social time in networking Cafes;
- attend award announcements and contests; and
- take the entire contents of the site home on CD following the event.

Significantly, because the content is entirely online, participants will continue to be able to access presentations, presenters, and colleagues throughout the year as need for specific information arises.

These events promoted common understanding of achievements; created a world-wide collaboration network driving behavioral transformation and evolutionary thinking; and improved world-wide execution of skills and learning processes supporting business goals and talent development objectives. By focusing on integration and use of new technologies, sharing best practices, recognizing dialogue as a core business process, and using facilitation techniques, the partner companies were able to create and sustain collective mindshare.

And participants never had to board an airplane.

## IBM Case Study I KMBLue

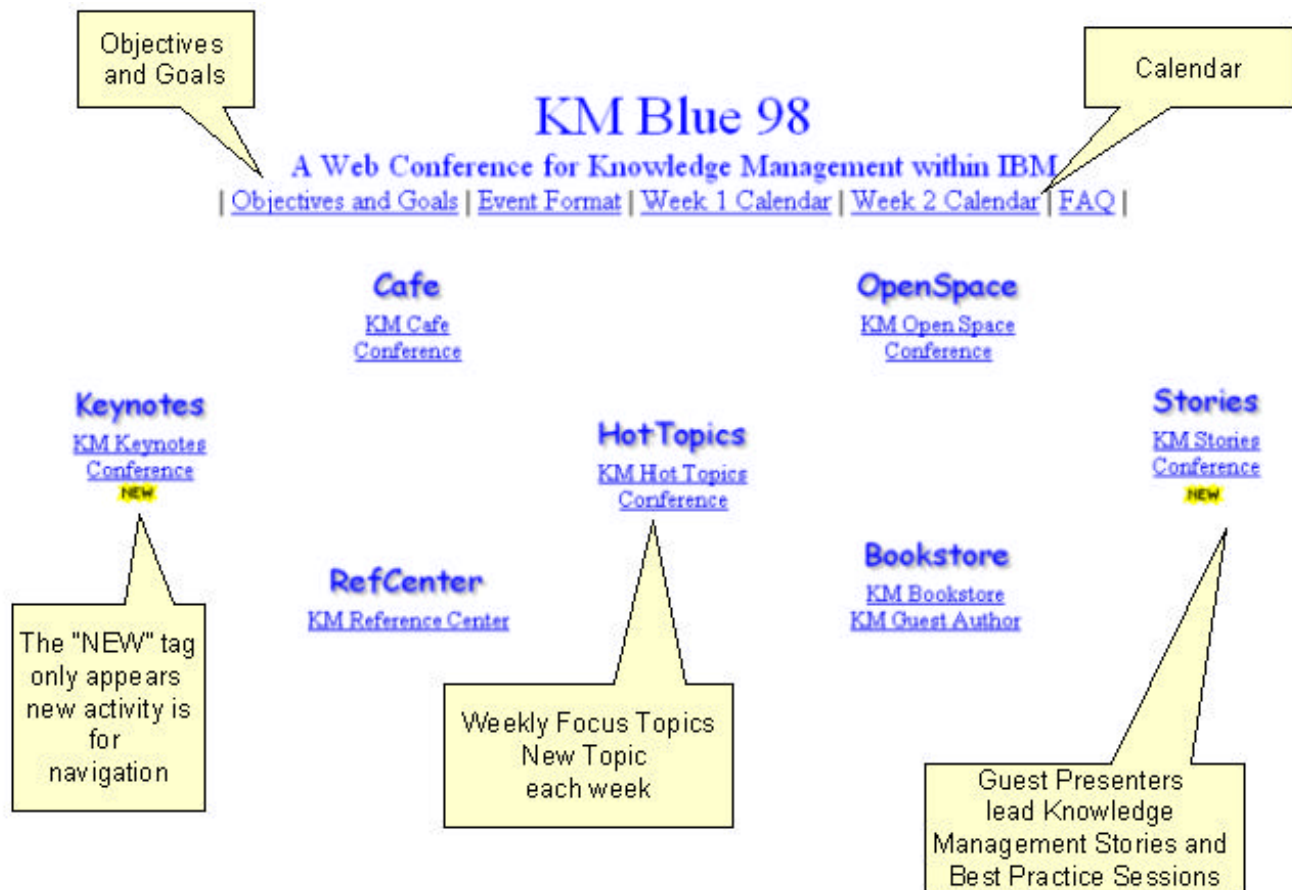
### The Problem

For Fred Schoeps, Director of Learning and Knowledge Management, at IBM establishing effective avenues for improving collaboration among knowledge management groups across the enterprise was strategic to IBM's ability to develop and unify common business unit strategies

### The Solution

We created a virtual forum called KMBLue98 that enabled over 300 knowledge managers from business units within IBM to actively engage and share experiences and knowledge over a 3 week period.

This virtual environment became a wellspring whereby knowledge was created, captured, and exchanged, enabling IBM to better leverage its knowledge management resource, talent and capabilities across the organization to meet its business needs.



## The Results

Through this virtual offsite event, IBM knowledge managers were able to:

- transfer basic knowledge about knowledge management;
- capture best practices for future use;
- enable participants to access knowledge management resources throughout IBM;
- network knowledge management groups across the enterprise;
- showcase current projects, case analyses, best practices ;
- develop and unify common strategies and initiatives (e.g., the testing community, strategy community, competency networks, etc.).

## Application

This application is well suited when business units have a requirement to:

- leverage knowledge and experience among cross- functional groups within an organization;
- showcase new products, processes, or projects; and
- create networks (communities of practice) to support business activities.

## Participants said:

*"We need to share knowledge between divisions within our group, and across IBM divisions on how our processes and products relate. As the Reengineering Leader, I am someone who needs to figure out how we can effectively deploy Knowledge Management methodologies, processes, and supporting tools to our group in this context --this seems to fit right in to tying us all together."*

*"I'm able to work on my current project during the day and participate in the conference in the evening. Best of both worlds."*

*"I've enjoyed the presentations and this format. The timing of this conference is perfect! I am pleased to see the wealth of experience within IBM and look forward to speaking with many of you."*

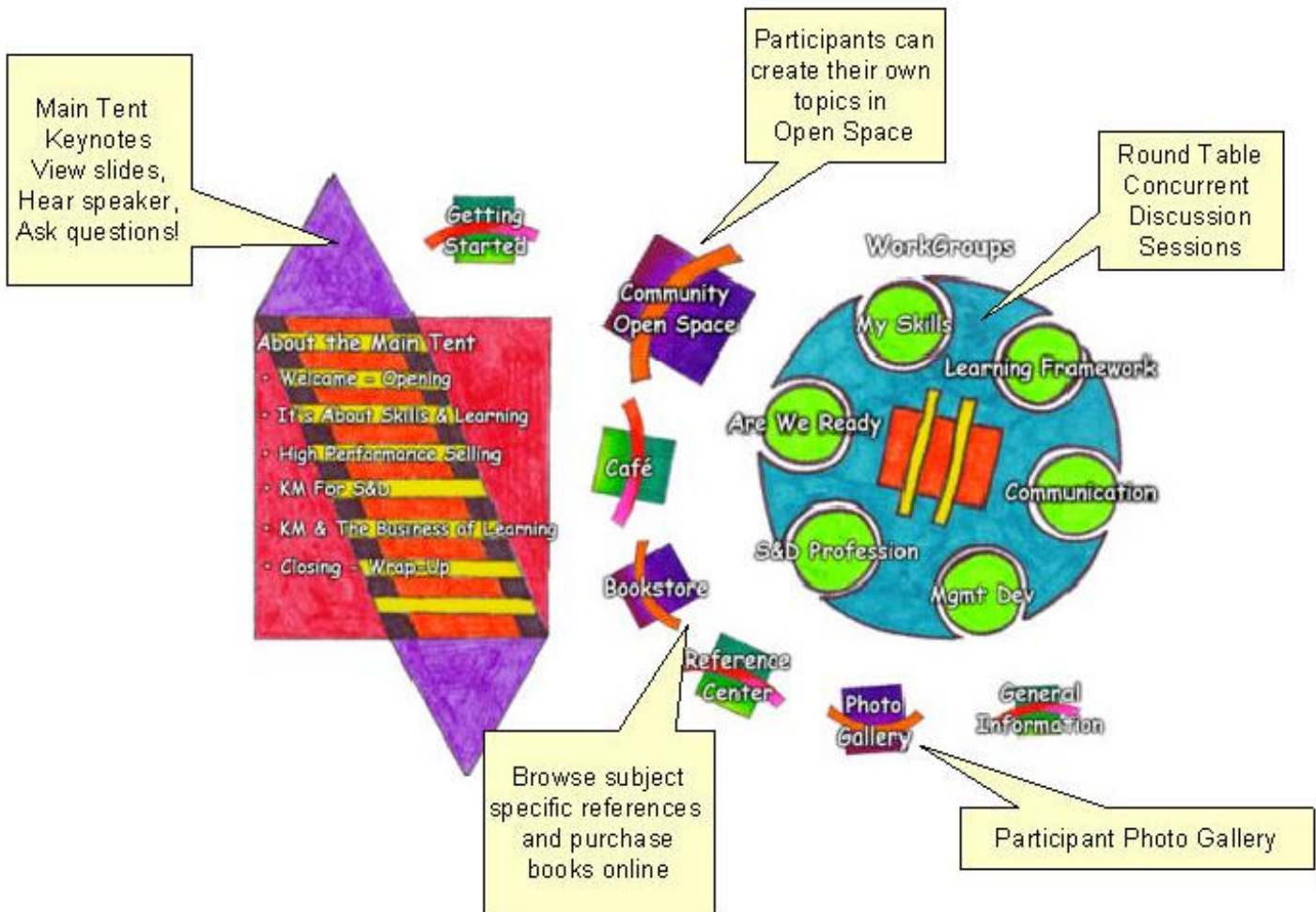
## IBM Case Study II Skills & Learning Web Conference

### The Problem

The IBM Sales & Distribution Group represents multiple sales & support initiatives that cut across all of IBM's businesses. The Skills & Learning Integration team ensures that we have the skills we need to win in the Marketplace - today and tomorrow. The world-wide community needed to focus on common, core and critical aspects of learning and how they could leverage their efforts with peers around the globe. Crucial to the on-going effectiveness of the S&D group was its ability to reinforce applied learning from the conference throughout the year and into the future.

### The Solution

In partnership with the S&D Global Skills & Learning team, we produced the S&D Global Skills & Learning Web Conference, which established a virtual learning community within IBM hosting & enabling over 500 participants from 34 countries to review and share their applied learning against real world experiences.



## The Results

Through this virtual offsite event, S&D was able to:

- create a worldwide network of people collaborating to enhance their skills and knowledge in order to achieve business goals;
- improve the delivery process for learning and knowledge exchange; and
- create interest and demand by additional people outside the target community.

*"I am very excited to see the collaboration that has begun through this conference. We all have much to learn about how we can leverage this technology to help each other and help IBM win in the marketplace. If we want to sell E-Business we have to be one, and what better team to lead the way than the group of folks who have the responsibility for learning!"*

.....Rick Martino ( VP of Talent)

## Application

This type of solution is well suited for business situations requiring the need for:

- multiple meetings for a large groups/teams;
- reinforcing applied learning;
- large scale (300+) meetings; and
- collaboration among cross functional groups.

## Participants said:

*"Wow! I am overwhelmed (at the moment) by the wonders of technology. This web conference process, platform, application is certainly a technological wonder to behold."*

*"I have enjoyed the flexibility and freedom that this type of meeting provided. Congratulations to those that pulled the conference together and gave us the opportunity to share this excellent skills information! I look forward to our next virtual meeting!"*

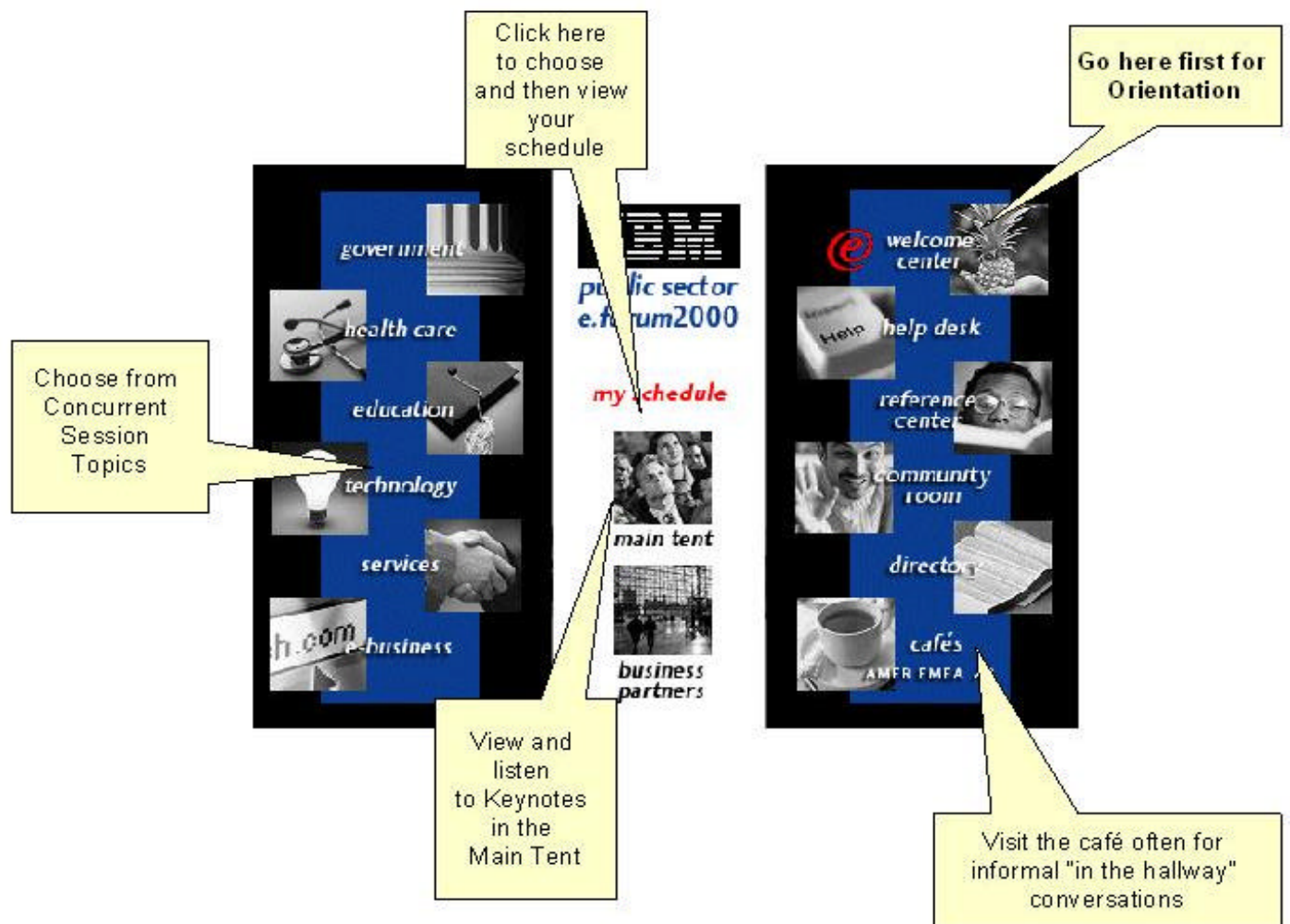
### IBM Case Study III e.forum2000

#### The Problem

IBM's Public Sector historically has conducted global kickoff meetings each year for their sales staff, related employees and partners. The meeting traditionally is both motivational and educational, celebrating past performance and setting the tone and targets for the new year. In 2000 the Business Unit sought a more cost effective solution while satisfying their global meeting requirements.

#### The Solution

In partnership with the Public Sector and IBM Learning Services, we designed e.forum2000 - a web-based conference featuring educational workshops, presentation with audio, keynote presentations, interactive question and answer sessions, an informal cafe for regional networking and recognition, and an exhibit hall showcase for business partners.



By using this new approach, the Public Sector took a leadership role in "walking the talk" of moving into an e-business environment with their own internal practices.

## Results

Through this virtual kickoff event, the public sector sales managers were able to:

- celebrate Public Sector successes;
- communicate key messages and strategies for the coming year;
- educate teams on e-business solutions;
- demonstrate the use of new technologies;
- create a vehicle for communication and continuing education;
- hold a forum for sharing and asking questions;
- provide an opportunity for ongoing communications between the industries and global participants in the Public Sector; and
- keep production and hosting costs at a drastically lower budget than traditional kick-off meetings.

## Application

This type of solution is well suited for business situations with the need for:

- large scale (1,000+) meetings;
- short deliverable schedule;
- limited or "no travel" budget;
- globally distributed audience;
- increased customer face time by taking less time out of territory; and
- creating modules of learning that can be used throughout the year.

## Participants said:

*" Better than a kick-off meeting because I can replay things several times. I can back it up to make sure I understood what you were saying. To be quite frank, it is just mind boggling how much information can be delivered over this medium. In my 27 years in IBM this is the most efficient way of delivering education that I've seen...very, very, very powerful! I'm sure we'll get much business out of it."*

*"I appreciate contents of sessions, excellent! They are very useful for my job."*

*"It has been a very good experience, and above all we proved that we can "walk the talk" and use what we sell to our customers."*

## **Seven Strategies to Make Virtual Learning Communities Work**

Working with virtual communities requires thinking about the same key things you think about when facilitating any team or community process but you need to extend your thinking about them to accommodate to the new environment.

### **1. Purpose**

Defining an explicit purpose is the most critical success factor when creating a virtual team or learning experience. Members need to know why they are there, what the outcome and/or products of their participation will be, what they are accountable for, and how to prioritize their time with existing work.

### **2. Roles**

Virtual learning communities need to spend more time being explicit about mutual expectations for facilitators, managers, and members because the patterns of behavior and dynamics of interaction are unfamiliar.

### **3. Culture**

What metaphors are you using for the environment and the interactions? How will these metaphors cue team members to think about where they are and what they are doing? Keep in mind that you are creating an environment to support relationships, and to create information not just to exchange information.

### **4. Conversation**

Many people associate technology with storing and exchanging data. Although you'll want to take advantage of the knowledge archiving features of new media, conversation among members is the most critical thing you need to support. Catalyze rich conversations and close ones that have burned out.

### **5. Feedback**

Since using technology as a primary means to communicate will be new to most members, participants need to spend more time than usual talking about the quality of their communication. Managers should develop a norm of providing feedback about communication style, quantity, frequency, clarity, etc.

### **6. Entry and Re-Entry**

One of the benefits of virtual learning community is that you can bring in new members from anywhere in the organization as required by the project. But the problem of the "rolling present" is particularly critical for new members and for members who have been away for a period of time. Develop introduction norms.

### **7. Weaving**

Weaving refers to the process of summarizing and synthesizing multiple responses in a virtual group. Make the whole easily visible to everyone. Tell people where they've been, where they are, and where they might want to go next. Likewise, it is a tool to track a particular project or action item.

## Media Choices

Members of a virtual learning community have communication and media preferences. These preferences are based on a range of legitimate factors including access, habits, previous experience, cognitive style, talent, and ease of access. Global learning communities need to consider cross-cultural issues such as thinking about time-zones and language issues.

But too many team members fail to consider key qualities of different media in their choices about when and how to use the full range of communications available to them. Balance team leader preferences, team member preferences, AND media qualities. Consider media differences in terms of the degree to which a medium is personal, warm/cold, urgent, novel, fast/slow, etc. Include a requisite variety and change modes for refreshment and impact.

Experiment and pay attention to how different media impact virtual group dynamics.

Media	Effect on Virtual Group Dynamics
Electronic mail	What norms need to be established for things like; response time, whether or not e-mail can be forwarded to others? Who gets copied on e-mail messages and whether or not these are blind copies? How does the style of e-mail messages influence how people feel about the team environment?
Decision Making Support Systems	How does the ability to contribute anonymous input affect the team? How can you continue to test whether “consensus” as defined by computer processing of input is valid?
Audio (telephone) conferencing	How can you help participants have a sense of who is “present?” How can you sense when people have something to say so you can make sure that everyone has a chance to be heard?
Video Conferencing	How can you best manage the attention span of participants? Where can video add something you can’t get with audio-only?
Asynchronous web- conferencing	How do you deal with scheduling when everyone is participating at different times? What’s the virtual equivalent of eye contact? What metaphors will help you help participants create the mental map they need to build a culture which will support the team process?
Document sharing	How can you balance the need to access and process large amounts of information with the goal of developing relationships and affective qualities like trust?

## Roles in a Virtual Learning Community

Identify and develop roles based on some of the same principles you use when bringing together a team for any production. You need a sponsor, project manager, designer, someone to attend to infrastructure and technology issues, someone to coordinate presenters and welcome participants, someone to think about fun and prizes, and most importantly someone testing the participant/user experience.

Often, one person will be responsible for multiple roles: roles and definitions of roles are broken down by task, not by individual job description.

**Project Manager:** Oversee production and coordinate other roles associated with production.

**Consultant:** Consultants participate and add content as needed.

**Participant Advocate:** Someone to make sure the customer requirements are being met.

**Evaluator:** Design and implement an evaluation plan.

**Marketing Coordinator:** Develop and distribute marketing materials.

**Press Liaison:** Feed materials to press.

**Web Designer:** The lead designer of the website and event platform.

**Systems Operator:** Responsible for the physical operations of the computer system and network resources.

**Graphics Artist:** Create images, logos, branding.

**Program Materials Jockey :** Provide session descriptions, speaker bios/pictures to web-site designer and marketing team.

**Registrar:** Coordinate registration.

**Program Resources Librarian:** Obtain info from speakers for links, papers, and other materials for reference materials.

**Facilitator:** Identify someone for each area of the event (keynote, workshop, open space, etc.)

**Coach:** Preparing key staff, facilitators and presenters for the event.

**Help Desk Coordinator:** Manage the help desk assisting participants.

**Harvester:** Gather key concepts, links, and summaries for products of the event.

**Reporter:** Create stories and newsletters, document highlights, and create updates.

**Volunteer:** Volunteers play a variety of roles depending on your needs.

**Ringers:** Established participants proactively creating conversations and keeping the inquiry going full speed

## Virtual Production Check List

Facilitation plays an important role in production. Regardless of the project planning tool you or your partner uses, there are some basic recipes for success. Keep the following checklist in mind:

- √ Start with high task focus. Make sure that this project is important to the organization and that all of the participants know it.
- √ Are you clear about the scope and desired outcomes of the project and/or community work? Can every member state this?
- √ Do you have the training and resources necessary to accomplish the mission?
- √ Does everyone have and know how to use the technologies and processes necessary to do the work?
- √ Define roles.
- √ Establish agreements on accountability for engagement.
- √ Document decisions and state the obvious. e.g. "Yes, I agree."
- √ Set up process to define and agree on norms and operating agreements. Particularly about sharing information.
- √ Be aware of, and purposeful about who has, and who should have what information.
- √ Attend to relationships. The amount of checking in needs to increase. Particularly in the beginning. Develop approach to introductions and getting to know one another.
- √ Use reflection tasks to rebuild team and trust in later stages of the project.
- √ Because the past is always present, need special care around adding new members--orient them to the online history, but realize how overwhelming it can be to view it all at once.
- √ Create tracks and footprints in physical space (participants still want the tote bag!)
- √ Remember to have fun! Balance the high-focused work time with relationship building.