Introduction

As manager of a small group of analysts, it is my job to assure that employees have the tools and knowledge to do their job. This means there needs to be proper training, good knowledge transfer, good teamwork, and a motivating environment. All this can be challenging to coordinate because it goes beyond structure. It means there is a culture of learning.

This desired culture does not exist right now, at least not in a very evident or productive way. I believe the biggest indicator is that there are inconsistencies in our output across the site. The desired products are standardized, so you would hope to see them come together as we move through our processes. One reason they are not is possibly because practices are not standardized. This may be due to a lack of knowledge transfer and collaboration.

The target or goal is to create and environment of cohesion and knowledge transfer. The question is how I will change my practice to encourage this? I have developed some questions I wish to answer in my search for ideas. They are as follows:

1. What motivates employees to learn and share their experience?
2. How do managers promote a culture of knowledge sharing?
3. How is knowledge transferred?
4. What have others done to encourage teaming and collaboration?
5. What is informal learning and how does it occur?

In an effort to answer these questions, I have determined that the best way is to explore writings in the following areas: mentoring, knowledge transfer, collaboration, informal learning, and motivation. I feel that addressing each of these will help in
answering the above questions and give me a greater awareness on how to change my own practice or method of management. What follows will be a look at each of these areas. I have chosen to tackle them in no particular order but may find in the end that one preceding another may be beneficial.

**Mentoring**

Perhaps one of the areas to explore first is that of mentoring. My company is big on mentoring and its impact on productivity. Enhancing my skills in mentoring can serve to change my practice in a way that motivates employees to share their knowledge. Collis and Winnips (2002) discuss increasing the productivity of mentoring and the concept of scaffolding. Scaffolding is a communication process between a mentor and a mentee. The goal is to increase the self-reliance of the employee. It first starts with a concept called *initial support*. *Initial support* starts with the direct support of a mentor called *task support*. It is, in essence, the jump start an employee needs to get started on a task. Specific instructions and guidelines are given to the employee. Once an employee has been set in motion, the mentor will evaluate progress and move to a stage called *ongoing support*. At this point the mentor provides support to the mentee in the form of feedback and suggestions for improvement, transferring tacit knowledge. The degree of ongoing support changes through time. Along the way, four decision aspects are utilized by the mentor. They are *task support, regulation, granularity, and management*. When considering task support, the mentor makes decisions on what type and how much support is needed by the mentee. Next, the mentor determines how much regulation is needed. It is the intersection of self regulation and ongoing support. Granularity is the determination of the size and scope of support offered. Finally, management relates to
the efficiency of the learning process. It is the enabling factor for the other three aspects. The final product that emerges from this process is a collaborative process.

The model for mentoring is usually a one-on-one relationship. While my goal is that of enhancing my mentoring skills, I am most interested in group knowledge transfer. A concept called “expansionist mentoring” (Bryant 1995) in which employees or mentees are grouped together in “learning groups” changes the mindset of traditional mentoring. Employees can be mentored as a group by one mentor characterized as a “learning leader.” They are as concerned about their own learning as they are about the learning of others and the success of the organization. An important aspect of this approach is the encouragement of the development of relationships.

Beyond individual mentoring, there is also discussion of team to team mentoring. Groups are brought together to learn from each other and develop best practices. I am especially interested in this since their may be some practices beyond my own group that can be learned and can be of benefit.

Bryant (1995) also encourages diversity in the selection of team members calling it a matching game. He feels that it enhances the development of a peer network with varied views. But he does mention that consideration of group chemistry needs to be considered when assigning mentors and mentees. Since I am working with an established group, I will not be picking my team. However, I do have influence on the types of people they will go to for knowledge.

Once groups are in motion, he encourages going beyond discussion to dialogue. The distinction is that discussion involves finding solutions, making decisions, gaining consensus, and maintaining hierarchies. Dialogue is deeper. It is about beliefs, exploring
ideas, and gaining knowledge. The mentor or “learning leader” should encourage
dialogue and serve as an advocate for experimentation.

While the concept of mentoring may not directly address any of my initial
questions, I think it does speak to the area of motivation. I am especially interested in
this concept of group mentoring. It seems to me that it could have benefits that cross
over into the other areas I am interested in such as how to encourage collaboration.

Knowledge Transfer

One of my big focuses as a manager is employee development. Since there is no
guide on how to perform each job at a detailed level, I have to rely on knowledge sharing.
This can be difficult to encourage. Employees can tend to hoard information because
they feel their sharing may not be reciprocated (Yang 2004). Whether this is the reason
or not, I feel there is a certain amount of hoarding in my organization. Yang goes on to
say “knowledge increases in value when it is shared.” Thus it is important to demonstrate
that sharing knowledge can have mutual benefits.

The first area addressed is Yang’s (2004) writing is that of encouraging a climate
of sharing. He stresses the importance of creating an organization that values collective
achievement and collaboration. This is a departure from the usual individual
achievement that organizations tend to recognize. Shifting the culture takes time and
needs to be built into the performance evaluation system. But, if handled correctly, an
atmosphere of mutual trust will result that can have profound effects on knowledge
sharing.
Yang (2004) discusses four approaches that can be employed to encourage the sharing of knowledge. They are motivation programs, feedback sharing from training programs, opening up communication channels, and capitalizing on social interactions.

In the area of motivation, rewards can be given, both intrinsic and external, that encourage knowledge sharing. He doesn’t delve into the exact types of rewards. But in my company there are many alternatives from instant gifts to cash awards. He stresses that employees should also be continuously educated or encouraged that knowledge sharers still possess their own assets and knowledge. But the benefits they will see are in the refinement and the enrichment of that knowledge as they share it.

Next, he addresses the employee that attends a training session. Typically at my company, when employees return from these types of sessions, the most we hear is that it was “pretty good” and that we should consider attending in the future. He encourages a debriefing in the form of a monthly employee meeting. In this, employees can share what they learned, thereby transferring their learnings to others. At the very least, it seems to me that employees can evaluate whether there is merit in investing more into the subject training.

Next, the opening of communication channels is addressed along with social interaction. Finding ways to encourage conversation and the development of social relationships can be key to knowledge sharing. Through this, people can examine what others know and what they still need to learn. One idea is that of “knowledge cafés” (Yang 2004), where employees can gather to discuss topics of mutual interest. This reminds me of a conversation I had with a friend of mine who works at Starbucks in Seattle. They have centralized coffee bar areas in their headquarters where employees
can sit in a casual environment and discuss work related issues. He has worked at a number of companies in the past five years and much prefers this to the more traditional methods he has experienced.

The next area of consideration is that of “communities of practice” (Wenger 2004). These are groups of people who “share a passion for something that they know how to do, and who interact regularly in order to learn how to do it better.” Wenger (2004). They are self managing. So the question is how to encourage or form this type of community.

Communities of practice have three fundamental characteristics. They are domain, community, and practice. The combination of these enables the management of knowledge. Domain represents the area of knowledge that needs to be explored. Community is the group acting upon this knowledge. Lastly, practice is the body of knowledge, tools, stories, etc., that are used by the community. Wenger (2004) also writes about the need to develop a strategy to harness the power of these communities. Moreover, the strategy needs to be transformed into performance.

He further writes about how to integrate the work of communities of practice into an organization. This is done through sponsorship, recognition, and support structures.

He speaks of sponsorship beyond traditional management. This type of sponsorship is management’s assurance that the community has the resources it needs and has a means of bringing ideas into the organization.

Recognition is something that was mentioned by Yang (2004) as well. He also addresses knowledge hoarding and how to address it. One advantage to knowledge sharing is that of reputation. Reputation is a “crucial asset” in a “knowledge economy”
Chris Kelly

(Wenger 2004). Peer and organizational recognition can enhance an employee’s reputation and this can be motivation to share knowledge.

Finally, certain support structures are needed to facilitate effective communities. First, explicit roles and dedicated time are needed. Second, direct resources are needed such as meeting places and funds. Third, a technological infrastructure including communication and information collection tools needs to be available. Lastly, they need a small support team to provide consultation and process advice. Some of these seem like a tall order for my small group and seem to speak to a larger organization.

The above research gives me much to consider as far as answering my questions about knowledge sharing, knowledge transfer, and collaboration. I will need to consider some of the debriefing ideas and the types of rewards that might encourage this type of culture.

Collaboration and Teaming

The above section on knowledge transfer seemed to spill over into collaboration and teaming. I think that is because they go hand in hand. I felt it important to dig further into how effective teams are formed and what makes a team effective. An effective team seems to be a learning team or “learning organization” (Payne-Anderson 1998) that moves beyond traditional learning.

In order to learn, a student must develop four abilities (Payne-Anderson 1998). The first is the development of concrete experiences, performing a job and keeping an open mind. Second, observation and reflection on these experiences is important. Third, the student must form concepts to develop theories. Lastly, the student tests these theories in new situations.
Payne-Anderson (1998) also breaks learning styles into four categories. He states that a *converger* is one who relies on practical knowledge as opposed to a *diverger* who relies on people and imaginative solutions. *Assimilators* are those who are motivated by theory and inductive reasoning. Then there is the *accommodator* who wants to get involved fully in new experiences. He feels that it is imperative to understand the adult learner to avoid wasting time and money.

The next area covered is strategy. He first writes about the development of learning organization and their purposes. They are to be a center where employees can learn specific job skills, a place of personal growth, and a place to acquire team-building expertise. He suggests multiple strategies that teams and organizations can use to enhance learning.

1. Cross-functional teams can provide diversity and broader knowledge. Job rotation can be used to enhance skill sets and provide growth.
2. Workouts can be used where teams are brought together for several days to work on intensive problem solving.
3. Action learning is used to enhance group learning experiences. Teams are given problems to solve outside of their area of expertise.
4. Succession planning can be used where managers share current responsibilities with future managers.
5. Career pathing is used to train employees in other positions. This is similar to job rotation but appears to be more like cross-functional training.
6. Mentoring programs similar to the ones previously discussed are also encouraged.

7. Employee exchange programs can be used as cross-peer coaching programs.

8. Distributive learning uses computers that employees can resource for learning.

9. Formal training still has a role and can be used to bring together diverse groups that can learn from one another in interactive exercises.

10. Town meetings are also a good way to mix diverse groups of people.

11. Celebrations of success can be events used for motivational purposes.

12. Self-directed teams can be used to tap into informal learning.

13. E-mail interconnections can be used across all boundaries and hierarchies.

14. Finally, cross-peer tutoring can be used to get information from a variety of sources.

Through all this, a focus on informal learning is encouraged. Training needs to become more holistic and move away from the traditional formal model. A contrast is made between traditional training and the learning organization in the following ways. Traditional is seen as focused on content as opposed to processes. Learning organizations should be focused on the workplace as opposed to the classroom. It should be learner centered as opposed to teacher centered. Learning should belong to the employees, not the training department. It should be outcome based as opposed to activity centered. And finally, it should be supported by learning consultants instead of training specialists. (Payne-Anderson 1998)
Goldsmith and Morgan (2006) cut to the chase by discussing how to create an effective team without wasting time. They write about the diminishing role of hierarchy that Wenger discussed. They both discuss and how networked team leadership is what is emerging as a need. They offer a process for building an effective team in an expedient manner.

The first step involves surveying team members on their current effectiveness. It involves asking questions about how well the team is currently doing and how well it needs to be doing. This can be done using scales such as 1-10. They stress the importance of also pulsing the team on whether they feel a team building exercise would be beneficial or is necessary.

The second step involves tabulating the results and presenting them to the team. In most cases the data will show that the team feels there is a gap between current effectiveness and where they need to be. It seems that this step is partly designed to gain buy in from the team on doing team building exercises.

The next few steps involve brainstorming ideas on how to close the gap between where they are and where they want to be. This includes identifying key behaviors that would help, prioritizing them, and encouraging dialogue about them. The goal is to have each team member exhibit these behaviors and report out on them monthly.

A further step involves doing follow-up mini-surveys to determine how each member is doing. Using an outside supplier to tabulate the results, each team member can receive a report about themselves and how the team is progressing toward closing the gap.
The final steps include a meeting after one year to evaluate how the team is performing. Ratings from a year ago can be compared to current ratings. Teams can re-evaluate the behaviors they identified the year prior. It is also an opportunity to celebrate and reward improvements with some form of recognition. I find this approach to be very intriguing and can see how I may be able to incorporate some of these ideas into my action research project.

I previously touched on the concept of communities of practice. Further research delves into how these are cultivated and seven principles are identified (Wenger, McDermott, and Snyder 2004).

1. Design for evolution. - Very little or a simple structure is all that is needed to start. Too much structure is limiting and does not allow growth. The goal is to “catalyze community development”, not stifle it.

2. Open a dialogue between inside and outside perspectives. – This involves soliciting the perspective of someone external to the group possibly from another community who can provide insight.

3. Invite different levels of participation. – It is suggested that it is okay if the community has a core group that takes on much of the leadership, an active group that participates in the activities, and still another group that is more peripheral. The goal seems to be to provide opportunities for participation rather than force it.

4. Develop both public and private community spaces. - Community meetings and websites are important to the group but so is one-on-one networking. It seems there is value to each that feeds the other.
Communities foster relationships. Those personal relationships wind up strengthening the community.

5. Focus on value. – The value of a community or their activities may not be evident at first. But it is important for the community to have dialogue about what provides value.

6. Combine familiarity and excitement. – As communities mature, there is a comfort level that develops. Community members become more open to sharing in a familiar environment. At the same time, it can be stimulating to introduce something new, like a guest speaker to provoke new thought and a feeling of adventure.

7. Create a rhythm for the community. – Here it is important to find the right level of meetings, teleconferences, or website activity to provide tempo. The community needs to be alive. But it can’t be so fast that members are overwhelmed or so slow that they become disengaged.

Brown and Duguid (1991) in their study of communities of practice, discuss the relationship between working, learning, and innovation. They suggest that the three are usually thought to be in conflict with each other. Working can be seen as steady and non-changing. Learning can be seen as distinct from working. Innovation can be seen as disruptive but necessary in its impact on working and learning. These three, however, can actually be compatible in a community environment and are intertwined. They state, “Workplace learning is best understood, then, in terms of the communities being formed or joined and personal identities being changed. The central issue in learning is becoming a practitioner not learning about practice.” (Brown and Duguid 1991)
Informal Learning

A number of learning theorists tend to study and contrast formal and informal learning. I have found that I am intrigued by the concept of informal learning because it seems to hold more of a key to the problem I am seeing in my workplace. There is a vast amount of knowledge that exists in the minds of employees that never has and probably never will be documented in a very formal manner.

So what is informal learning? It is described as four principles by Lee, Fuller, Ashton, Butler, Felstead, Unwin, and Walters (2004). They are:

1. Context – Learning that occurs outside of classroom based formal education settings
2. Cognizance – Intentional/incidental learning
3. Experiential – Practice and judgment
4. Relationship – Learning through sitting with someone, mentoring, teamwork

Cross (2006) further describes informal learning as a product of the evolution of learning and feels it is a greater necessity now than ever before. He believes that learning is social and that independent or informal learning leads to high performance. It is this performance that is what ultimately matters to corporate executives. He feels that although corporations spend most of their training budgets on formal learning, the majority of learning is informal or natural. He encourages "free range learning" or putting the learners in charge so that it is self service and free of bureaucracy.

The reason he places such an emphasis on the importance of informal learning now is he believes we are in an age of networks. Networks expand and evolve naturally
and there is value in that. Where previously, human communication and governance began in nodes and progressed to top down hierarchies, it has evolved to an age of democracies or distributed networks. Networks subvert hierarchies so the formal becomes obsolete.

He believes it is the same with the evolution of learning. He describes the beginnings of learning as “on-on-one”. This progressed to the classroom environment. But today we are progressing toward an informal environment of networks.

Cross feels the progression to informal learning is a good thing and organizational success depends on it. The nature of work is changing and discretion is needed in the work place. Employees need to be able to transform relevant knowledge into appropriate action. This can’t be learned from a training program. It is learned from working with others. It has been described as “tacit work” or ,“discretionary improv” (Cross 2005). It is not something captured in a job description but is crucial to job performance and improvement.

He states that we are in an age of accelerated change. Technological advancements have always occurred through history. These advancements continue at an exponential rate. As such, it is believed that the advancements ahead of us in the 21st century will be equivalent to that of 20,000 years of that in the 20th century. This means things will change rapidly for the rest of our lives. Faced with rapid or massive change, we have two options, adapt or die. If we choose to adapt, we can either rely on our own evolution or choose to learn. Since evolution is slow and can take eons, it is to our advantage to learn. (Cross 2006)
Looking at learning, there is a spectrum that can vary from formal to informal. Using an analogy, formal leaning is described as a bus (Cross 2005). It is great if the bus is headed to where you want to be. However, informal training is more like driving a car or riding a bike. Learners can go straight to what they need. They can set their own pace, spending time reflecting and taking advantage of mentoring, storytelling, and nurturing.

Formal learning is found to have scant impact when it comes to affecting behavior. In a study of what really does affect behavioral change, it was found that learning only impacts it by 10%. Additionally, it was found that of that learning, only 20% is formal learning. This is in the form of classes and workshops. Going one step further, it was found that only about 20% of what is learned in these workshops and classes actually translates into employee behavior change. Doing the math, 10% x 20% x 20% = 0.4%. This translates to less than 1% of what changes employee behavior being attributable to formal learning. Yet 80% of corporate training and development budgets are spent on formal training. (Cross 2006)

Cross feels that learning is optimizing our connections to the networks that matter to us. It satisfies the community concept of learning (similar to Wenger’s Communities of Practice) and the knowledge aspect which is gaining access to information or “stuff”. He describes this as the “learning ecosystem”. A learner interacts with stuff through pipes such as net connections. Web pages and other information are the “stuff”. Learners also interact with people through relationships. Through these interactions with people and stuff, learning occurs. (Cross 2006)

People learn best when they:

1. Know what is in it for them
2. Understand what is expected from them
3. Connect with other people
4. Are challenged to make choices
5. Feel safe about showing what they do and do not know
6. Receive information in small packets
7. Get frequent progress reports
8. Learn things close to the time they need them (just in time)
9. Are encouraged by coaches or mentors
10. Learn from a variety of modalities
11. Confront maybes instead of certainties
12. Teach others
13. Get positive reinforcement for small victories
14. Make and correct mistakes
15. Try, try, and try again
16. Reflect on their learning and apply its lessons

For the above reasons, Cross (2005) encourages “free range learning”. This is described as putting the learners in charge so that it is self service and free of bureaucracy. Learning needs to be relevant and timely. If it isn’t, then it isn’t retained.

Below are some of the tools Cross (2005) describes that can be utilized to encourage this type of informal learning.

1. Visualization – Pictures can be utilized instead of text laden books or manuals. It has been found that humans learn twice as well when
pictures are integrated into training with traditional text. This engages both hemispheres of the brain.

2. Conversation – Dialogue is the most powerful learning technology on Earth. It is the origin and conveyer of knowledge. Conversations are the “stem cells of intellectual capital”.

3. Virtual Connections – Instant messaging, blogs, etc. It is important to utilize all connections at our disposal. In an age of rapid change, it is part of survival.

4. Network Connections – As stated previously, networks subvert hierarchy. Every official organization has a shadow organization consisting of informal networks. These need to be utilized in that we learn so much from others in our networks.

5. Physical Connections – The place where leaning occurs can impact knowledge transfer. It is important for this place to be inviting. As a side note here, there can be crossover between this and the virtual environment. A good example for the Bucaniners would be the difference between the lecture amphitheatre environment we were in at the beginning of one of our Second Life classes versus the hot tub setting at the end.

6. Emotion – There can be no knowledge without emotion. It is important to consider what interests the learner. What do they have a passion for?
7. Whole Body Learning – Learning goes beyond the brain. Studies have shown that a concentration on keeping oneself healthy and spending time in meditation have dramatic positive effects on learning.

8. Unconferences – Meetings or conferences do not have to be rigid, “dumbed-down” events. Cross describes a successful conference he attended that was only organized six days prior but was organized by attendees who had a passion for what they were doing.

9. Internet Infrastructure – As stated above, it is important to keep up with rapid change. It is important to take advantage of the tools available and develop an intranet structure for learning within a corporation.

10. Learning Without Limits – Encourage training and learning that is not defined by a standard goal or a passing grade. Rather than accepting adequate achievement, encourage breakthrough performance.

11. Get better at Getting Better – Recognize that informal learning is natural. Treat people and organizations as living things.

   The key is being open to change. Many of these tools may not work in every environment but we are warned to avoid “bipolar thinking” (Cross 2005). It is not a matter of what will and won’t work but a matter of to what degree it might work. Since the majority of our learning is informal and we are in a rapidly changing environment, it is important to leverage our social environment to enhance learning. Traditional or formal learning has its benefits but it alone will not keep up with the rapid change.

Motivation
As a manager, it is supposed to be one of my primary goals to motivate my employees so they have a desire to do their job well. This will be necessary in solving the knowledge transfer problem I face. So it is important for me to think about how I will change my practice in a way that is motivating to them. I feel this is crucial in the age of change. Apathy can quickly put you way behind in a rapidly changing environment.

Motivation is described as “the inner force that drives individuals to accomplish personal and organizational goals” (James Linder 1998). Here are the results of a study from Linder on motivation showing the rank order of factors that motivate employees:

1. Interesting work
2. Good wages
3. Full appreciation of work done
4. Job security
5. Good working conditions
6. Promotions
7. Growth in the organization
8. Feeling of being in on things
9. Personal loyalty to employees
10. Tactful discipline
11. Sympathetic help with personal problems

I’m not sure I am surprised by the rankings. I know for myself, my number one was good wages when I was younger. But now that I am in my forties, I am definitely seeing the value in interesting work. And it is quite the challenge at times to paint financial analysis as interesting work!
Since it is a group that I am trying to encourage and motivate, I also looked at whether there were differences in approach to motivation at a group level. Garza (1998) found in some studies that in many cases, as people were rewarded for their individual performance, their team's performance ability worsened. It was also found that the more people were rewarded for their performance on a team, the better the team performed. So the challenge is changing the culture by recognizing the list of items that motivate employees and tailoring it to the group level.

**Conclusion**

Looking back at the questions I had formed before digging into the research, I feel satisfied that they have been answered to a certain extent for me. I feel my next step at this point will be to pour over this research and pull out some tangible ideas on how to work with my group. I wish to change my way of managing in a way that motivates my employees to work well together and share their knowledge. The final question for me will be how will I change my practice and how will that affect the practices of my group? I look forward to the process and finding out.

**References**


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North Texas Web site: http://www.workteams.unt.edu/literature/paper-kbryant.html


**ARP Action Plan**
Environment

I am the Finance Manager of a manufacturing facility in Auburn, WA that employs about 1,000 people. I have three business analysts that support this facility and interface with shop management, other analysts across the greater site, and a core finance group. The entire site employs over 3,000 people. In addition to the business analysts, I also have a staff analyst and a training administrator.

Each analyst has specific responsibilities and tends to focus only on those. Knowledge transfer has been one of my major challenges as I have very senior employees who are good at what they do and less experienced ones who have a difficult time getting up to speed.

There is little formalized training in the Finance community. Most learning comes from what is sometimes called “tribal knowledge.” Mandatory high level training and regulatory training tends to be delivered using good online tools but at the job specific level, there isn’t much.

The Problem

The Business Planning and Analysis group at Boeing’s Auburn Site, consisting of 5 analysts that report to me and about 20 on site, supports both the manufacturing leadership group and Company Offices with financial analysis products. Although the desired products are standardized, the output tends to be inconsistent and contain errors due to a lack of knowledge transfer and collaboration.

Summary of what the literature says about my problem
The literature is replete with ideas on motivating employees, encouraging team cohesion, and incentivizing knowledge transfer. It all seems to center most on relationships and dialogue. This seemed to be a recurring theme throughout the writings. There was not necessarily a leaning toward complete abandonment of structure and formality. But informal learning, teaming, and collaboration seemed to far outweigh training sessions as the preferred mode to pass knowledge.

I was intrigued by the concept of team mentoring. Traditional mentoring is usually one-on-one. I think this is something that I definitely need to focus on in my group. As individuals, I have been satisfied with their work. In private meetings with them about their performance on their own work statement, I have usually had positive comments for them. However, I find I get frustrated by a lack of cohesion among them. Some of these readings have opened my eyes to the fact that I need to have more regular team discussions where we can talk specifically about how the team is doing and how they are interacting. I also like some of the ideas on team building without wasting time. The theme again seemed to be a focus on dialogue and also surveying and brainstorming ideas on teaming.

The above focus on mentoring and promoting teamwork seemed to lead naturally into the research on informal learning. Informal learning seems to also revolve around relationships and dialogue. So building that foundation seems very important. Informal learning also seems to be propelled by some of the
latest technology based tools. So I will need to consider those as I dig deeper into working with my team.

**Description of what I want to do to address my problem**

I felt the literature had much to offer in the way of ideas to address my situation. I first want to encourage team cohesion through team mentoring. I have recently begun the practice of holding a weekly staff meeting. Previously, I would have one every other week or even canceled it if I didn’t have anything to share. But I have come to the revelation that it is important to have staff meetings even if I have nothing to say at all. I am finding that if I have nothing to say, that can be a good thing. My employees may have a lot on their mind in the way of work issues and solutions to problems that I and others would never learn about had I not kept the meeting. I think this fosters relationships and keeps dialogue alive.

I also wish to engage them in cycles of brainstorming about what is causing our problem and what types of ideas they may have to change it. I would like to utilize some of the technological tools (web 2.0) that I have been learning about. This may prove to be difficult as my company is very slow to introduce new tools due to security issues. I am hoping our intranet wiki pilot program is up and running soon so I can take advantage of that tool and introduce it to the team.

My ultimate goal is to change my practice or my way of managing. I want to find ways to incentivize teaming and collaboration and make it part of our performance evaluations. I would also like to discourage knowledge hoarding
and change the culture to view knowledge sharing as beneficial both to the organization as well as the individual.

**Data I can gather to determine a “before” picture**

I can put together an online survey that can be directed both at my immediate team and others in the Finance community about the current condition of the organization. The questions can center on how each employee currently feels about how standardized our products are, how well we are doing at transferring knowledge, and maybe some questions that dig into possible root causes. Another possible indicator may be our “stoplight” performance charts that measure our delivery and accuracy.

**Data I can gather to determine the effects of the changes I have made**

I’m thinking that I can use the same survey or a very similar one after a few months to see if there has been any change to employee opinions after the cycles. The “stoplight” charts may give some indication as well.

**Timeline of the project from January 1 through June 1**

- First week in January – Begin dialogue with my manager about his perception of the Finance community. Introduce the idea of changing the environment and get approval and feedback on ideas.
- Second week in January 2007 – Begin to gather data using survey
- Mid-January 2007 – Begin Cycle 1. Facilitate group dialogue and brainstorming on the type of knowledge that needs to be transferred. Try to determine what crucial knowledge is. Brainstorming will also
include how employees feel knowledge should be transferred. I will introduce any technologies that are available at that time.

- March 2007 – Measure for change. Use survey to determine effectiveness.

- April 2007 – Begin Cycle 2. This cycle is not entirely clear to me at this point because a lot of what comes from the team dialogue and surveys will shape the format of Cycle 2. However, I am thinking that this cycle will include a review of survey results and brainstorming on lessons learned and how to further improve any gains or reverse any missteps. I am also hopeful that some pilot programs will be up and running such as wikis on our intranet. I am hoping to encourage technology based solutions that might enhance dialogue and collaboration.

- May 2007 - Measure for change again and compile data. Also begin new cycle similar to Cycle 2.

- June 2007 – At this point, I hope to be in Cycle 3. Again this will depend on a lot on the results of Cycles 1 and 2.