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KNOWLEDGE MANAGEMENT IMPLEMENTATION WITHIN TWO GLOBAL E-BUSINESS ORGANIZATIONS: A COMPARATIVE CASE STUDY ANALYSIS

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Abstract

This paper compares and contrasts the experiences of two global corporations as they have conceived and implemented Knowledge Management (KM) initiatives. After researching management studies on the subject, both companies developed their own KM in eBusiness strategy. The two case studies discussed in this paper highlight Business-to-Business (B2B), Business-to-Consumer (B2C) and Business-to-Employee (B2E) initiatives at these two global organizations.

Keywords: Knowledge management, eBusiness, case analysis, KM implementation lifecycle, global IT strategy

Introduction

Yockelson (2001) stated that “By 2003/04, organizations will approach KM as a set of principles, practices, and technologies focused on innovation/optimization of core (B2E) /internal (2001) and B2B (2001/02) processes. Most KM efforts will be delivered as enterprise portals combining unstructured and structured information aggregation and contextual, personalized delivery within standards-based frameworks.”

Based on the existing literature research, there is quite a bit of confusion about the definition of KM. During the next few years, organizations will begin defining KM on their terms, including appropriate management incentives to support KM initiatives within each of the organizations. According to Yockelson (2001), the estimated \$6B portal industry will be inputs for many of these initiatives to support management’s organizational and business objectives.

While management and knowledge workers are grasping to understand knowledge management, it seems so obvious to start with the customer. First and foremost, it is pertinent to anchor the initiatives to a solid foundation, which, in all cases, should be customer needs. Regardless of the potential payoffs-top line or bottom line, time savings or relationship improvement-the underlying value proposition should be firmly grounded in the only entity that ultimately pays the bills: the end-customer.

Although the benefits of managing intellectual capital as part of the most valuable corporate asset in eBusiness are overwhelming, the actual implementation of such a practice is often protracted. To understand how this affects a company’s strategy, we looked at two global organizations. The first company is a global information technology company that is a provider of technology solutions for the travel industry and the other a global telecommunications company.

Once the top management team members of the two companies had decided that their organization could benefit from the management of intellectual capital, the next question was, "How do they actually do it?" This paper explains how two global companies addressed their internal KM initiatives within their eBusiness organizations.

KM starts with electronic repositories for knowledge, but that's the easy part. The greater challenge comes in building a knowledge-oriented culture and changing the work habits and attitudes of employees who often see knowledge as status rather

than something to be shared. Recent surveys conducted by the authors included interviews and on-line surveys. The interviews and surveys of eBusiness employees conducted at two global high-tech firms found that several respondents did not know their companies had KM initiatives, while other respondents in the same work groups were keenly aware of these initiatives.

KM is a way of thinking. It is not necessarily just about having electronic files that can be accessed by a given group. According to Porter and Bennet (2000), KM provides a methodology for creating processes within the organization to promote knowledge creation and sharing. It is for this very reason that processes, rather than technology, drive knowledge management.

Research Methodology

The purpose of this exploratory research conducted in Fall 2001 was to determine if there was a correlation between KM implementation within two global companies involved in e-business in two different industries. An extensive secondary research that included academic and practitioner journals, books, websites and white papers found the material to be vague and expansive. To add clarity and focus to the research question, case study analysis of two global corporations was chosen as the primary research methodology. Since the companies and executives/knowledge workers discussed in this paper wished to remain anonymous, interviews were not tape recorded. The authors also felt that recording the interviews might be impractical as it may lead to more inhibited/"politically correct" responses by the subjects. To validate the data, each team member monitored all conversations designated as research and notes were compared. Based upon informal surveys prior to additional primary research, it was determined by the team that there were enough consistencies between the two companies to justify a case study of the KM practices at each organization. Triangulation of data collection efforts and review of interview notes/findings by the interviewees was used to ensure reliability and validity of data.

Case 1: A Global IT Company

For decades, the Global IT Company has been developing innovations and transforming the business of travel. From its original system, to advanced airline yield management systems, to leading travel Web sites today, this firm's technology has traveled through time, around the world, and touched all points of the travel industry.

The IT company is a provider of electronic distribution services for the travel industry around the globe as part of KM technologies. The IT company supplies information and systems support to travel agencies through its global data center. It also develops software tools for the travel industry. This company enables airline, hotel, car, and cruise vendors to distribute detailed information about their products to the travel agency community. In addition, the IT company now provides application programming interfaces (APIs) and development assistance to the travel industry for using the Web in new and innovative ways to contact customers.

The corporation built its original systems and services on a platform of mainframe computers. First, providing access to airline reservations, and then expanding into hotel, rental cars, and cruise lines. Today the IT company has a global presence in numerous countries assisting thousands of travel agencies. The IT company provides access to the travel industry by supporting a variety of operating systems residing on their clients' terminals. The Microsoft Web-solution platform now in use supports real-time access to data and services provided by the mainframe Central Reservation System.

The company's customers connect to the systems through multiple networks, using just about every standard and nonstandard operating system and network protocol. The IT company must supply its customers with a wide range of APIs and Graphical User Interfaces (GUIs). The company develops or works in cooperation with the customer to provide customized and extensible applications.

Now, the Web, as the tool of implementation of KM in eBusiness, has brought a new challenge to the IT company. The travel industry needs to present more of their information on browsers, either as part of their business sites or by offering their customers access to a Web-delivered product. With the advancement of information flows between the IT company and its customers, the use of knowledge within the IT company has become the central point for discussion. The IT company owns internal means of basic KM principles and how those principles impact daily operations is the focal point of the internal KM processes for the IT company (See Figure 1).

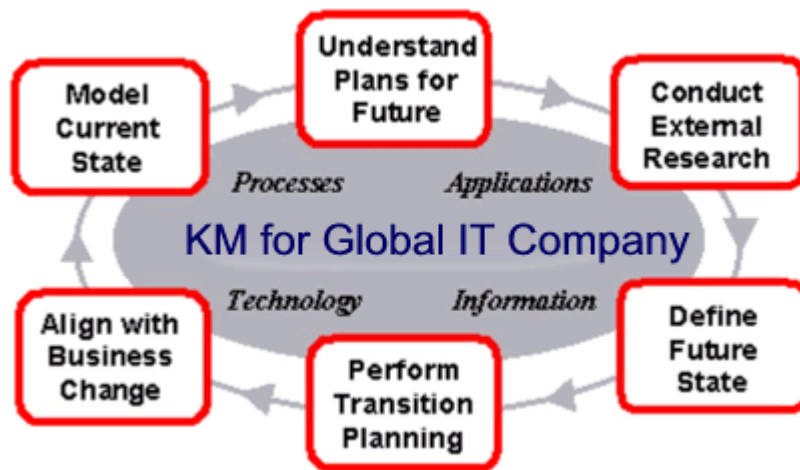


Figure 1. The Global IT Company's Internal KM Implementation Lifecycle

The Need for KM at the Global IT Company

The majority of data sources within the company either replicated data or had redundant data within them. Therefore, meaningful search and retrieval could not be done, as navigating to the required data was cumbersome if not impossible. More often than not, multiple data sources were required for obtaining the desired results. This approach was difficult, time consuming and in some instances, technically infeasible.

There was no access to accurate enterprise-wide data because the information infrastructure was fragmented throughout the organization. Every group or department had their information, which was not shared throughout the IT company. There was no central repository for the knowledge worker to obtain and use a centralized data source of information. For example, many applications or web sites maintained their own employee database separate from the LDAP email server. Employee-related information from multiple point sources was the norm instead of the exception. Management could not get access to detailed financial information without relying on finance analysts and multiple spreadsheets. If the data in these spreadsheets is tied to organizational data, it's usually incorrect or outdated. Under this current model of unstructured information, many employees were working on mundane data-manipulation activities that were necessary to feed information to the decision makers and frontline sales force. The IT company was not effectively leveraging its workforce or its business intelligence.

This situation arose for various reasons. First of all, there was no common architecture to create common KM standards. Each implementation team had the ability to choose the platform, data definition and access mechanisms to obtain knowledge. Simply saying "use Informix" did not constitute a uniform approach to the management of data that must roll up to a common enterprise view. There was also no common means to access the data that led into homegrown departmental data repositories. These issues fostered an environment of knowledge redundancy/duplication, created data definition issues and lead to a fractured view of business information.

Issues and Concerns Regarding KM

Based upon the interviews with senior management, knowledge workers at the IT company agreed that KM was important to their job although less than half of those surveyed were aware of any formal KM initiative. This implies that communication of the KM initiatives at the IT company needed to be addressed.

A common understanding of what KM is must exist among all employees of the IT company. Second, there must be improved processes for ensuring proper distribution and sharing of knowledge within the business units and across the organization. Knowledge workers at the IT company want to share knowledge, not just figures. They do not want to continually reinvent the

wheel because they want to learn from the successes and opportunities of others. Organizational structures and personnel can change often - KM would help shorten the learning curve - benefiting their customers and the knowledge worker.

There was also a reoccurring theme of redundancy and rework. There needs to be more alignment of organizational goals and awareness of progress made against these goals by enhanced focus of job tasks thereby increasing productivity.

The use of technology was a strong indicator on how to best implement a KM initiative. The participants of the survey felt frustrated and isolated because the lack of internal structure to proper KM principles.

The Global IT Company’s Solution to Internal KM Proposed Solution

The IT company has already identified some areas of improvement for KM and the internal architecture of the KM system as illustrated in Figure 2—although nothing formal has been initiated. To better control the situation, the IT company needs to implement the following outline, for managing and controlling information throughout the organization. Each of the segments are designed to functionally align the IT company’s internal systems strategies with its business strategies and support the prioritization and planning of the IT company’s internal KM initiative.



Figure 2. Physical Architecture of the KM system the Global IT Company’s Proposed KM Strategy

The following briefly discusses a proposed structural resolution to many of the IT company’s internal architecture and KM problems. Each of these segments of the IT company’s proposed KM strategy are discussed below.

Business and Corporate Administration (BCA) at the Global IT Company

The BCA business segment includes the business areas that support the business operations for the IT company’s knowledge management. The BCA portfolios include: productivity and office automation, messaging, web portals, corporate services and corporate communications. The objective is to lay down the foundation for creating a doorway for all the knowledge workers to get the content and data within and beyond the enterprise.

The overall objective of BCA is to provide knowledge workers with a uniform starting place for finding information and completing tasks. The concepts central to this initiative are:

- Content and data aggregation
- Collaboration and community services
- Personalization

The primary business objectives for BCA are to more fully enable knowledge workers and promote productivity and growth by:

- Improving corporate communication and collaboration
- Better information for knowledge workers at all levels
- Increasing productivity and efficiency
- Reducing support costs
- Better leveraging existing IT investments

After general evaluation of the existing and future business needs, the IT company researched the related solution requirements for knowledge management. It was determined that the project scope should be significantly expanded to include the following elements as well:

- Focus on leveraging web services
- Within the company there has been a pronounced shift toward the use of Web Services to deliver dynamic service offerings personalized to the user's business needs
- Web content and document management requirements

There are numerous existing business needs for managing Web publishing activities, managing documents and incorporation of related business process workflows. All of these can best be deployed within the context of a portal solution.

Demand and Delivery Management (DDM) at the Global IT Company

The Demand and Delivery Management focuses on the IT company's staffing needs. As new projects are introduced, the need for resources increases. DDM systems allow project managers to obtain the knowledge to forecast resource demands and plan capacity, prioritize and allocate resources accordingly. The following DDM portfolios at the organization were identified:

- Demand tracking and forecasting
- Prioritization
- Program/project management
- Resource management
- Time tracking
- Tracking of demand for the IT company's resources

DDM will capture the need for human resources and will distribute demand notification to appropriate portfolios for forecasting equipment, facilities and infrastructure resources. The IT company will rank the requests for demand based upon organizational strategy and the ability to deliver. DDM provides the ability to effectively allocate human resources to defined priorities. The DDM also provides the ability to consistently plan, manage and report on work throughout the organization, using established methods for managing and completing work activities on time, within budget and according to specifications. This allows the tracking of actual time to feed project management, billing, payroll and financial reporting. By implementing DDM the IT company has more control over the information of resources.

Customer Relationship Management (CRM) at the Global IT Company

The IT company's CRM system is an enterprise-wide business strategy designed to optimize profitability, revenue and customer satisfaction by organizing the enterprise around customer segments, fostering customer-satisfying behaviors and linking process from the customers. CRM is enabled through a set of discrete applications and technologies which focus on automating and improving business processes in front-office areas such as marketing, sales, customer service and support to enable one-to-one

marketing. Implementing CRM for the IT company will provide a wide range of benefits to the organization including but not limited to the following:

- Capture and effectively utilize all data resulting from customer "touch points". Touch points include the IT company's web site, help desks, field service, sales force, account executives, marketing, product installations, service centers, etc.
- Enhance productivity in front office functions through applications such as contact management and calendar management for sales force.
- Streamline front office workflow through application integration to enhance efficiency by eliminating silos and fostering best practices.
- Optimize front office resource utilization by providing business KM through applications such as customer data warehouse, data mining and analytical tools.

Revenue Cycle Management (RCM) at the Global IT Company

RCM focuses on business areas within the IT company that are closely related to creating and processing client invoices and how that knowledge is managed. Billing cycles, processes, details and terms are all included. Account receivable aging, overdue analysis, and collections are also part of RCM. The following areas within the business are considered key RCM components in managing this knowledge:

- Invoice management
- Pricing
- Usage management

Enterprise Resource Planning (ERP) at the Global IT Company

The concept of ERP for the organization encompasses the systems, information and processes associated with a specific set of functional areas. These areas include accounting, finance, procurement, warehouse management and human resources. Traditionally, these functional areas have their own computer system, each of which is optimized for the particular way that the department performs its work. Today, the ERP model strives to combine these functional areas into a single KM repository. This integrated approach allows the business areas to more easily share information and seamlessly communicate with each other. The benefits of integrating ERP processes can be seen in the following:

- Eases the exchange of data among other corporate functional areas
- Unites all major ERP business practices within a single family of software modules
- Achieves reduction in the costs of hardware, software and maintenance associated with multiple systems
- Drives towards shared data structures vs. multiple, segregated data structures
- Provides an opportunity to re-engineer business processes into a "best practices" business process that the ERP delivers

Infrastructure Resource Planning (IRP) at the Global IT Company

The Infrastructure Resource Planning includes those areas within the firm that are responsible for acquiring and managing corporate assets used to support business operations. The following five portfolios for the IRP were identified:

- Asset management
- Change management
- Customer order management
- Problem management
- Workforce management

Deploying a successful IRP infrastructure is the key piece for the IT company success as it allows the organization the ability to deploy assets quickly and manage them effectively. Efficient deployment and management translates into lower costs throughout the organization. Assets managed by IRP systems include desktops, mid-range equipment, network and data center equipment, facilities infrastructure, and software. The IT company's IRP processes manage equipment ordering, asset installation, problem

identification, problem resolution and change implementation. This is a key fundamental part of managing the knowledge for corporate assets.

Enterprise Systems Management (ESM) at the Global IT Company

The Enterprise Systems Management is comprised of the business areas associated with managing a distributed computing environment. ESM systems are designed to increase system availability and performance through monitoring and managing network services, user security, job scheduling, software distribution and software upgrades. For the corporation the following ESM portfolios have been identified:

- Event management
- Remote management
- Network management
- Security administration
- Software distribution
- Capacity/performance management

Enterprise Information Management (EIM) at the Global IT Company

The EIM includes all business areas that provide data that management relies upon to make quick and accurate decisions. The IT company needs to identify the following portfolios in the area of EIM:

- Data warehousing
- Reporting
- Enterprise application integration
- Decision support systems
- Document management
- Imaging

The objective of this effort is an enterprise-wide data warehousing and reporting environment that facilitates the sharing of business information and knowledge across the IT company (spanning all organizational, product/service and system/platform boundaries). EIM integrates data across applications on multiple platforms in a manner that is transparent to the end user. It also provides an end-to-end view of business information by providing common definitions of enterprise data. This also integrates into the overall internal systems architecture and support of the IT company's enterprise systems efforts. EIM delivers the competitive advantage by providing the right knowledge, to the right knowledge worker, in the right form, at the right time.

Case 2: Extranet Portal Experience at a Global Telecommunications Company

The success story of the global telecommunications company encompasses more than 100 years of technological, social, economic and political change. From its beginnings as one of the pioneers in the creation of the worldwide telecommunications network – surely one of our greatest inventions – this company has played a key role in the remarkable history of communications technologies over the last century. Today, the Company is firmly positioned in the heart of the Internet revolution.

The Telecom Company's overall eBusiness strategy is focused in two separate areas:

- (a) How to do business directly with their customers both today and in the future, and
- (b) How to capture information from customers, suppliers, partners and employees for internal use by the company's *knowledge workers*. The sharing of information between the company, customers, and suppliers (see figure 3) would facilitate taking orders, getting products and services to the customer and receiving payments faster.

But there are interim objectives as well: Gathering knowledge through intelligent Web tools to anticipate what customers want and when. Accepting an order faster and actually having the inventory on hand are two different things. Sharing information throughout the supply chain is more important than ever with the large amount of outsourcing that is taking place in the industry.

Through the Internet the customer would have one URL, a personalized portal that would verify their identity, allow them access, and give them a personalized view of their favorite sites on the Company's extranet. They could configure complex switches, lookup prices, place orders, view order status, exchange large documents, give future forecast information and even download software capable of turning on features in an exiting telecom switch. This is part of a concept referred to as Enterprise Self-Service (ESS). ESS is the accessibility of an enterprise's applications, information, and business processes, across the web and over wireless devices, to effectively serve its employees, partners, and customers in a personalized and collaborative way. The promise of ESS is measurable benefits. It cuts costs because it unifies web sites, streamlines business processes and reduces sales expenses and service costs all while enabling an enterprise to share knowledge. The reality might be something different.

Change has not always come easy. It is a substantial adjustment for the Company, customers, and employees to share information in a less formal manor. Previously, a representative for the customer would request information. The representative from the Company would gather the information and fax or mail it to the customer. In today's world, the customer wants the information now. The change was reasonable, the Company had to find solutions.

In the quest for providing and sharing knowledge with customers and employees, a growing number of unregulated intranet/extranet sites were being developed on the Company's network. Like most large corporations, the global telecom company was feeling the strain of the growing number of unregulated sites managed by multiple groups within the corporation. Product groups had set up sites to features their products and programs. Customer account teams had set up Web sites to post information very specific to their accounts. After all, most of the Company's employees and the customer's employees were *knowledge workers*. They needed access to this knowledge.

These unsanctioned Web sites were beginning to cost the corporation millions of dollars. An actual figure is unknown, but it was becoming clear there had to be some control and consolidation of the data. An organization was formed: eBusiness Operations. This was not to police the network but to actually make it a user-friendly experience for the customer while limiting the need for multiple sites. To accomplish this consolidation, the Company decided to move toward providing personalized portals to employees and customer alike as one of its eBusiness KM initiatives. In addition to allowing secured exchange of information and access to other Web pages throughout the Company's site, the portal was a widely accepted Web tool.

Within a company's network, business-to-employees (B2E) allows employees to have access to the greatest amount of the enterprises knowledge assets. The business-to-business (B2B) partners have somewhat restricted access to the information and the end-user (B2C) has extremely limited access to information. Figure 4—shows the access levels of each of the constituents.

Personalization allows each user to customize their view of the information to meet their specific requirements. Controls are in place to limit the "areas" a user may browse, but there is some degree of flexibility in the view of the material presented.

Armed with this new technology and the need to address change, the Telecom Company set out to dismantle the myriad of Web sites existing in organizational silos that focused on individual customer communities.

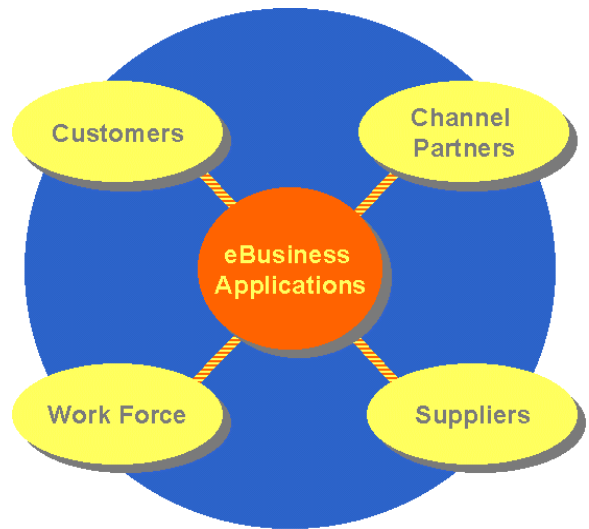


Figure 3. E-Business Information Sharing

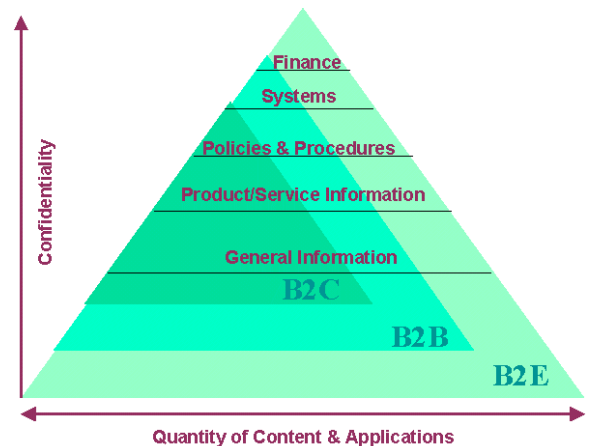


Figure 4. Information Access per eBusiness Model

To address the business needs, the myriad of Web sites existing in organizational silos needed to be consolidated into a handful of enterprise portals. These portals would be supported by a centrally managed, highly scalable environment with distributed administration and content management capabilities. E-bBusiness operations placed its focus on the customer, with plans to extend the company's reach further than ever before by concentrating on a best-in-class Web-enabled customer experience. "It's all about execution and leveraging the Internet to extend our reach," said one company VP responsible for the eBusiness strategy and operations. Broadvision's InfoExchange Portal seemed to be the perfect solution.

To accommodate all the major accounts and to bring costs in line, a personalization project was conceived and implemented. The concept was brilliant. Each customer's employees would be given access to a customer-specific Web site that would be personalized using off-the-shelf portal technology. Sites would be much easier to create and maintain a designated employee either from the company account team or the customer could grant secure access to approved personnel.

It is the claim of the portal industry that portals can extend an enterprise's information, resources and business processes to employees, partners, suppliers and customers in a unified and collaborative manner and reduce operational costs by 25% over a one year period. The primary cost savings is the reduction of servers on a company's network. If true, the benefits of implementing the portal strategy clearly outweighed the cost of implementation.

The Results of the Portal Implementation

The portals were implemented and information was transferred from existing account team Websites to these new communities. The implementation team was pleased with the results. But the customers had a different opinion of the new portal than the Company's management. The customer would have liked a portal, but they would have preferred the portal to be on their Web site, not their suppliers'. Additionally, there was actually more management required than before the implementation of the project. New users had to be added to the communities one at a time instead of, as with the older systems, added in bulk. Information that was fed to the sites from a central server was not kept up-to-date. As a user signed in, there might be news of an event or tradeshow that had already past. The personalized portals are still in use today because that is the only controlled extranet access the telecom company will allow, but they are not exactly a success. Many of the accounts teams have abandoned them altogether.

Implications for Management

Upon researching vice presidents, managers, knowledge workers, articles, business journals, and various trade journals, a common theme permeated our findings. Both primary and secondary research validated that employees at both companies, as well as the general research community, thought they knew what knowledge management was; however, when comparing the information, there was little consensus. This lack of consensus was a telling theme. Most knowledge workers do not agree on what constitutes knowledge management.

Additionally, the reams of research the team read also appeared to be very detached. There was little consensus among academics as to what exactly KM was or was not and how it fit into the eBusiness equation. Not one concise definition appeared over and over again, therefore the theme appeared to be: no theme at all. These findings surprised the authors. If the business world and academia cannot agree on a common definition of KM, how can knowledge workers expect to understand management's KM initiatives?

Current Obstacles Facing the Organizations in Both Case Studies

KM at both companies is not exactly definitive. The questions still remains: What knowledge does a company need to capture? In the primary research with employees and management of both companies, the answer to that question is relatively simple: lots and lots of knowledge. Not exactly a scientific response.

So, what knowledge is important to the employees, senior management and customers? In both companies, internal attitudes toward KM seemed to take second place behind operational efficiencies and customer interaction. As time goes on, it has is clear information and knowledge are the forces within the business units to automate their operations. At the information level, data

integration between old systems and new systems, old process and new processes will enable more Web operations. Figure 5 illustrates the difficulties encountered in implementing KMS by organizations.

Many firms that participate in KM have difficulty trying to quantify or justify its costs and savings into present day dollars. Management feels that the KM initiatives help the company share resources but at what cost? Companies think that KM helps their operations but our investigation showed that neither company has measured the effectiveness of their KM initiatives. The primary reason is that KM is difficult to measure. Without an industry-by-industry standard, an organization may have difficulty proving their success in implementing KM initiatives.

KM means different things to different people; therefore, knowledge workers have difficulty in understanding their firms' KM initiatives. Knowledge workers from both the Global IT Services company and the Global Telecommunication company were questioned about their firm's knowledge initiatives that brought contrasting results. Without a general consensus on its definition, knowledge management will continue to be questionable. If this continues, companies will continue to struggle with measuring the effectiveness of their knowledge management initiatives.

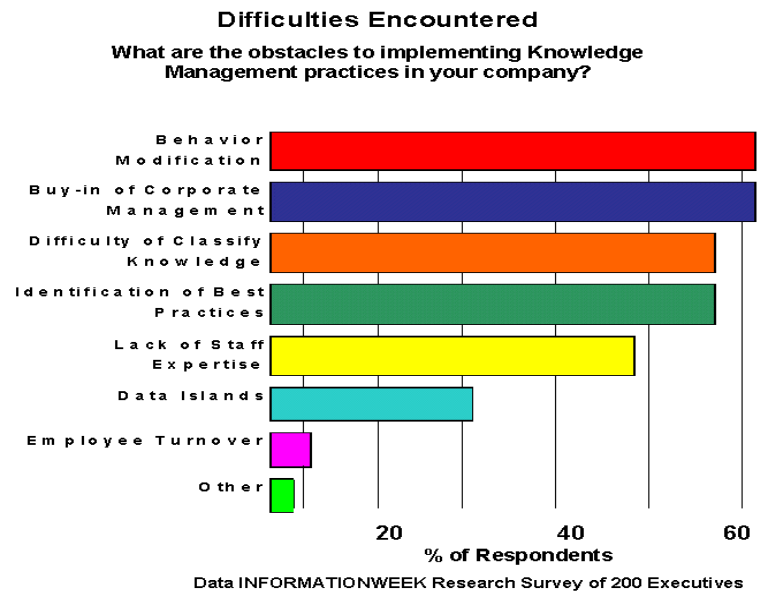


Figure 5. Difficulties in Implementing KMS

Implications for Researchers

After reading numerous documents regarding KM in various organizations, an unmistakable definition of KM has still not emerged. The term has been bantered about long enough. A clear understanding should be have defined by now and become part of common vernacular. In contrast, *Re-engineering* the buzzword of the '90's, was clearly defined as "the radical redesign of a company's business processes... in order to meet the demands of a modern economy". Although the term KM is contextual, in order to have consistent meaning to different individuals in different enterprises, it would help if a base definition of KM emerges.

Is KM the management of the intellectual property each employee possesses? Should employees be required to share this knowledge? Is KM the information covertly gathered from customers as they travel through your site or call into your call center? Is KM all the data captured in a data warehouse/CRM tool or is it the multitude of structured and unstructured server farms within the enterprise? Is it simply knowledge when it's not shared and KM when it's shared? Or, is it only considered KM at the time the information is put to use whether shared or not?

Conclusion

This paper explored how two global corporations, a telecom firm and an IT service provider, addressed and executed their own KM initiatives. These firms had different customers, one internal and the other external, but similar issues and results. The majority of the results were focused on one recurring issue: lack of agreement on definitions. The authors discovered similar results while researching journals, trade magazines, and other research. Across the board, professionals, managers, lecturers, and academics have different views as to what knowledge management is. This confusion was evident within our two case studies. Management felt strongly about certain KM initiatives while professional knowledge workers had different opinions. The authors conclude KM is about how to capture a body of knowledge that enables an organization to be more efficient and effective in its daily processes.

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