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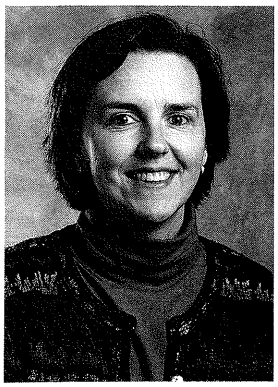
INFORMATION IN CONTEXT
MICROSOFT INFORMATION SERVICES APPROACH
MARY LEE KENNEDY



Information professionals have always been responsible for ensuring that customers receive the information they need to make decisions and to learn. Most of us work in organizations where our mission is to do just that. The need to provide context has become more urgent and more complex as the user choices for content and delivery vehicles increases, the mobility of our global workforce increases, and the speed at which events occur make knowledge the most competitive asset of an organization. How do we contribute to the provision of information in a complex world?

Microsoft Information Services approaches this challenge on three fronts:
1. Understanding the business context and drivers, including how we can influence the desired business result. 2. Packaging and delivering information solutions based on a customer segmentation that defines levels of service. 3. Providing a content architecture to integrate external and internal information, and eventually structured and unstructured information

Background Information

Microsoft Information Services (IS) is chartered with ensuring the corporation as a whole has the:
* external content it needs for effective decision-making,
* ability to access critical information (both internal and external), and
* internal messaging that leads to an informed employee base. Our tag line is "It's what you know that counts".

Our three core competencies are:
1. Information management - IS has unique expertise in capturing, organizing, packaging, disseminating, and retrieving both external and internal information. Examples of IS' information management contributions include vocabulary management, search and retrieval through MSWeb (the corporate portal), and external news packages.
2. Information contextualization - denotes putting the information into context for the knowledge worker by variously summarizing, abstracting, interpreting or synthesizing it. Examples of IS' contextualization services range from providing short summaries of news stories sent to internal distribution lists, to providing insight into the research methodology used by market research vendors, to summarizing key industry events relevant to Microsoft's business goals.
3. Communication- enabling connectivity between communities within the corporation, including the creation and delivery of key messages and corporate directions. The scope of IS communication efforts includes helping with executive communications as well as key HR messages that apply to the entire company, and building web communities around strategic initiatives.

Information Services defines success through a measurement program focused on demonstrating our business impact. The five areas included in the program are:
* the dollar/time contribution of our products and services to the end business result
* the effectiveness and efficiency with which we ensure our company has the most appropriate external content, globally
* the contributions of our information expertise to strategic initiatives, and
* our ability to increase employee understanding of key messages.

The Challenge

Take over 7 billion websites worldwide, add in the inability to search both structured and unstructured content, add that CIO's are still solving the huge problem of organizing internal content, plus that over 30% of the U.S. workforce is mobile or commuting (and this is increasing), that the cost of external content is going up while the perception remains that most external content is free (and good), and that each one of us has never before had so much choice as to where we want to find that information. Did I mention that most organizations work 24 by 7 (or following the sun as we refer to it), and the need for information is about as basic as the need for water and food? How about an increas-

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ing level of frustration and dissatisfaction with what content is available. Sound challenging enough?

There are no magic answers to this phenomenal challenge. It is fun to work out solutions. Below is how Information Services is approaching these very issues within Microsoft.

The Information Services Approach

1. Understanding the business context and drivers, including how we can influence the desired business result. Ultimately this means all parties must understand our value.

As information industry experts, information professionals are challenged with meeting information needs as defined by a myriad of scenarios. In most organizations there is no one-size fits all, and how to meet all these needs can be overwhelming. How information is sliced and diced, packaged and delivered all depends on a customer's role, function, stage of a business process, or out-of-the-blue "fire drill". A good reference interview can be the perfect solution if it is really focused on understanding the sought-out business goal. I also believe it must be a much deeper situation than that. In essence it is how much we understand of our organizations' initiatives, are a part of those initiatives from the beginning, and whether we are imbedded in the business processes themselves, which really will allow us to contribute to the maximum. If we are sitting on the sidelines and only engaged when our customers think they need us then there are serious limitations - both as to what we know, and as to what our customers think we need to know. And this ultimate point is the most significant, and often the most difficult to achieve. If we are considered an essential member of a team that is driven by a common goal, then our work can be understood by our customers in terms of the contribution to the goal. It works both ways - we need to understand how we fit, and so do our customers.

As a multi-disciplinary support organization, we see ourselves as working in the "knowledge box", where we are a part of the corporate knowledge environment. The "knowledge box" is really that place where knowledge workers take what they understand of the business goal and the desired end-result, focus their attention on assimilating the relevant information, cognitively processing it, expressing it either verbally or in writing, validating it, and ultimately using it to drive the result. Information Services is an important contributor to the information infrastructure, supporting the activity in the knowledge box through its competencies in information management, information contextualization, and communication.

Information Services has a very strong customer base with receipt of unsolicited "kudos" a regular event; just as often from senior executives as from the "rest of us". Nevertheless, it is new for our customers to place a value on what we do, especially from a financial impact perspective. Although anecdotal evidence of our impact is important, we are adopting a measurement program that can quantitatively demonstrate our contribution. Our focus is on hours saved, costs avoided/redirected, new ideas created, key contacts identified, old ideas avoided, and contribution to a sale, a partnership, or a new product. This approach makes it clear that we are a part of the business result, not an outside service, and that we are all responsible for that magic moment when information leads to cognition and then leads to an action that eventually delivers a result. It also makes it clear to us that we are a part of a process and we must understand that process to make a difference.

An ongoing dialog with key stakeholders ensures we are all setting out on the right foot when we look to propose changes. This type of information "joint-ownership" is essential for our continuing successes. Equal investment in success really drives us all to achieve the expected results. It also ensures we have defined the work space with the same language.

2.. Customer Segmentation. The senior team for Information Services set out goals and objectives based on an analysis of where we could make the most significant contribution to the bottom line of the corporation. The group has traditionally had very strong ties to the customer base, and so we continue to grow our offerings as key contributors to business processes. Our biggest challenge is the incredible consumption of information by all employees. Like all knowledge-based corporations, ours is driven by a need to know, and the use of information and our expertise is very intense. As the corporation grows, we have had to focus on offering a spectrum of information services and products defined by the internal market we have: functions, business processes, roles, geography. By first addressing where we can make the biggest impact, then we can segment the targeted audience/partners for our work. The kinds of services and products we offer will depend on who needs them. Pretty basic. There is a baseline of

services and products to which everyone has access through the web, email, our email aliases, phones etc. After that, we spend a lot of effort adding value. The entire spectrum requires ongoing review with the customers to ensure we are really meeting their needs. The relationship aspect of customer segmentation is very time intensive with huge returns for our efforts.

For everyone there is what I call "roll-your-own" or "do-it-yourself" information solutions based on the availability of content repositories. Everyone also can access our services through email, the web, the phone, and in person for the more traditional services of circulation, document delivery, on-demand reference, web-based content resources such as news and market research. We broadcast out to the corporation basic knowledge solutions including knowledge centers on Microsoft strategic initiatives (that focus on ensuring all employees have the knowledge base to speak intelligently about the strategies, and can find out where the work is being done both inside and outside of the corporation), key company events, and daily news features highlighting industry events that are applicable to the corporation as a whole.

Based on an analysis of who our most frequent on-demand customers are and what they are asking for, we build self-help tools for the most recurring information requests. This multiple source/multiple format solution is embedded where the knowledge workers do their work. This is a change from asking everyone to point to our web solution. Branding becomes an essential element in ensuring the customers are aware of whose work they are benefiting from.

We partner with key executives and initiatives. Our research team averages about 82% of the effort working with senior executives and their direct reports. The focus is on in-depth market and industry reviews and analysis restricted to confidential teams.

Organizationally we have segmented our customer-base, assigned clear roles and responsibilities across the group depending on the solutions needed to meet the customer needs. This has also meant working through the gray areas (because there are always some). This has led to cross-functional teams, and a single point of contact for our customers. An account management approach has made it much easier to understand the context of the customer group, and also for the customer to have a relationship with us that ensures we keep a pulse on their business priorities.

The whole idea of context has become more and more complicated as we focus on meeting regional needs (Asia, Latin America, Europe, and Africa), including local and language needs. Another challenge to context is that most people still count on people to really put their knowledge into context. Just how to make the people-"print" combo work in a business process that doesn't lead to an over-engineered solution is very challenging. It is unlikely we will ever have enough staff to deal with all of the in's and out's of the perfect solution for the many customer segments we support, what we need is to influence technology developments to help us out.

3. Content architecture. Content architecture is the keystone of a technology response to the ability to customize information solutions to match context. The principle way in which Information Services is addressing the technology challenge of providing an infrastructure that supports context is through a knowledge architecture initiative. The initiative is to jointly establish a common set of vocabularies with the business division content publishers. By building a distributed vocabulary management process and registering schemas, the result will be a better information retrieval environment AND the ability to use content (both structured and semi-structured) in context, on any device.

Although this is technologically challenging, and very human intensive, the greatest benefit comes from our partnerships with key content owners across the corporation. The goal of ensuring easy flow of information across the employee base is something everyone can buy into. By focusing on the goal and positioning ourselves as the neutral, content experts, we can work through the politics of content ownership. A greater challenge is motivating authors/publisher to tag the content. This is less and less of a problem as the level of frustration on finding authoritative, relevant information increases. Another challenge ensuring our technology solutions facilitate content exchanges...the beauty of .xml and .xsl. We must also find solutions that reduce the extreme human investment required to tag millions of information sources (both internal and external). The growth of auto-tagging technology will be a significant contribution. It alone will not resolve relevancy, but it will go a long way to making it possible to focus in on the most important areas for information experts to map out and highlight for end-users. Our

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architecture works like this: If you are a developer and want information on Windows 2000, it is very likely your information need is different than if you are in a product support role working with a customer to address any technology questions about implementing Windows 2000. So if you both search for information on Windows 2000, you will retrieve information that leads you to the best sources based on your current context. Ideally, the work will set up a system that guides content proactively. We're not there yet. We're working on it. We believe this will be groundbreaking and extremely important in addressing the area of context.

Conclusion

Microsoft's Information Services is addressing the provision of products and services in context by defining where we add value, knowing how to communicate that value, segmenting our customer-base through understanding the business drivers, and building an information infrastructure (people, process, technology) that supports our programs. As the choices become greater for how people use information, we also know we must study information user behavior. We are addressing that through our content strategy - based on the knowledge we gather as we focus on the three areas mentioned above. Context is equally important as content...we have a lot of opportunity to make a difference.

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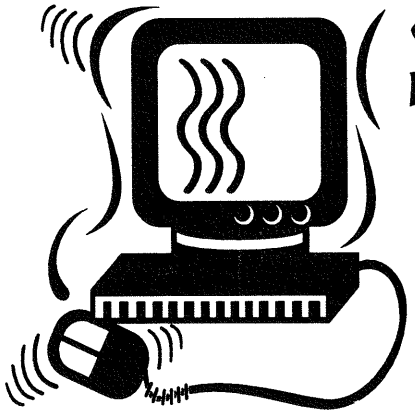

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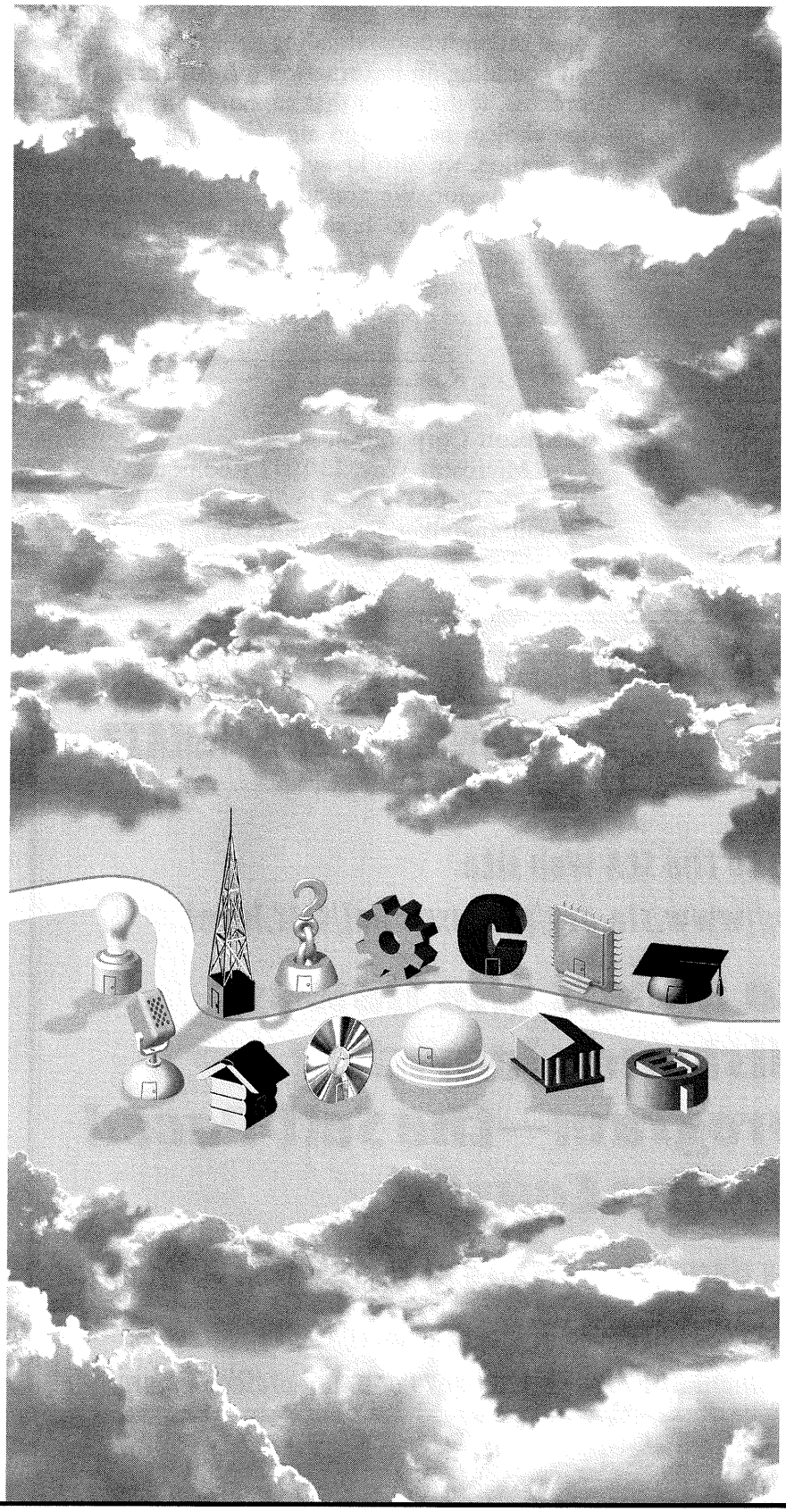

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