

Questions & Answers

A Fresh Outlook – MS Outlook as a Knowledge Hub

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Questions both addressed during the webinar and those we did not have an opportunity to address at that time:

Q: Do you see MS Outlook as an obstacle or a catalyst for better knowledge access and sharing in the enterprise?

Ted Graham

If you catch me on a bad day I'm certainly going to say it's an obstacle, but it has also often been a catalyst to capture more than we've ever been able to capture in the past. We're always trying to catch up with how our employees are using it. One of the things I'm able to do is have email discussion groups. You see, in all of our offices we have these all in lists where people will ask questions by email. It's a great way for us to keep on top of what the hot topics are. We then have the ability to capture that in a technology repository. Things like this wouldn't be obvious to us or available to us without Outlook and email and I always want to try to balance that sort of transactional need of this tool with the long-term reusable knowledge that we're looking for.

Teresa Grote

You know honestly I would have to break that out into two parts. I think Outlook is a catalyst and I think Exchange is an obstacle. What we're doing with IBF is taking Outlook and connecting it to the systems where I really want that content stored. That makes Outlook a catalyst. I don't think you can ignore that people are going to be working in Outlook, but the Exchange database is most definitely an obstacle.

Shy Alter

Outlook will be an obstacle if one does not think through how it can be better leveraged. What we do with Outlook dovetails with many KM processes like sharing and even capturing. It can be leveraged and become a catalyst. Ignore it and you fight for face time with your users, and then it becomes a hindrance.

It can be a problem area if its ignored. I think that the tendency of the likes of Ted and Teresa and their organizations, is not to ignore it but to recognize what it can or cannot do, take advantage of those elements that work, ignore those elements that don't work, and make their own decisions about what features they would or would not leverage. Ted is making a very good use of email because he believes that there is a great deal of value in the kind of communication that it provides, and Outlook is a big part of that. You can decide not to do anything about Outlook itself and not to extend it, but it needs to be an explicit decision, and you then need to make further decisions as to what it means to the users, how do they use Outlook, and how does it dovetail with your knowledge management processes.

Q: Most users in our organization are tied tightly to email, but I wouldn't say there is much attachment to any other aspect of Outlook. They don't use tasks, only some use the calendar, they don't use private or public folders. Are we strange or is this other people's experience and if it's a common experience, isn't it really the case that they would embrace something with more functionality outside of Outlook so long as the communication aspect was still tied to email?



Ted Graham

This is a great question and I know a lot of people who have started off on other email programs, whether it be Lotus Notes or maybe Novell GroupWise or things like that. And a lot of times its what they're used to. I remember talking to my wife, who works at a law firm, about Novell GroupWise. They were switching over to Outlook and she was so confused by what the differences between the two applications were. For example, she was no longer sure how to create a distribution list.

I think Microsoft has always been a strong leader in terms of getting in an installed base. This benefits them greatly, because when more people are familiar with the functions and the verbiage and what task they are going to undertake, they have a great advantage in terms of dictating the work flow in advance. Because of this entrenchment it's very difficult to come in with some narrow knowledge management tool and try to change the workflow, and the way people communicate.

That being said, it's true that there are a lot of functions of Outlook that aren't being used. In our organization we've shut off public folders because we want more people to share things through our portal. And private folders, while they're an acceptable way of managing information, have a tendency to become very unwieldy and largely unsearchable. This is an especially big problem when people have been using email for 10 to 15 years in the same organization. In the end though, I think rather than switching people off Outlook, we'll have to improve the ways we do things like search Outlook private folders. Alternately, we can try to get people to better organize things like private folders or learn how we can integrate tasks with team tasks and project management.

Teresa Grote

I think the calendars and tasks are difficult because they are included in so many other applications and Exchange must then be updated and it is only one way- example, any kind of tasks - it can send one way to Exchange but if it gets updated then the two applications are out of synch. This is a huge problem.

Shy Alter

No, not at all. The emphasis that I placed up front on the deployment of any tool obviously comes to bear on this particular issue. Some of us who may be power users will take advantage of just about everything that Outlook has to

offer. However not everyone is a power user. If the deployment into the organization was not properly managed, and also if certain features have not been turned on, and if some of the process changes have not been accomplished, then, no, its not unusual for Outlook to be underused. And, of course, it's a pity.

If certain aspects of Outlook are under utilized but could and should be further leveraged in your organization, an emphasis should be placed on education and communication with your user community. If, on the other hand, those functions could be (and should be – according to your strategy) provided “outside” of Outlook – you can still leverage Outlook’s “communications” functions. If this is the case, your concern should be to seamlessly integrate functions from other systems (like a portal) and the most popular functions offered by Outlook.

Q: Can Outlook or for that matter other MS Office components offer an alternative knowledge consolidation interface to Intranets, portals and federated search engines?



Teresa Grote

I have developers who want to consider themselves to be web developers or VB developers or C++ developers. My approach to this is everyone of those should be a part of your knowledge consolidation, and that's what I believe the web service as an IBF allows you to do. When we sit down and look at an application, very rarely do we look at it and say this is a web application. We look at the business intelligence and the database, and then we determine point at which users need the information. I need it in Word. I need to be able to generate documents. Or, I need it in Outlook so that I can respond quickly and appropriately. All of those applications should be a way to enter into a process wherever you are.

I'd also like to address the issue of not using all of the features of Outlook. I believe a part of the reason for that is that if you look at the way Calendaring works in Outlook and Exchange, it is a one-way application and it is not easy to pull that date information into any other view. And usually you need more information than just a date, and I think a lot of firms, a lot of companies, because they have complex scheduling, cannot use the Exchange or Outlook offering for scheduling. This is a real problem, a challenge to be overcome. PDAs have helped, and the ability to do some synchronization that way is great, but there are some real issues with trying to do group scheduling in an Exchange environment.

Shy Alter

Most of us with some experience implementing knowledge and information management solutions have discovered that there's never a silver bullet. There is no 'one-size-fits-all' knowledge management platform. This is because of the need to balance technology with change management and culture, and also because of the need to balance various business processes and the tools they represent.

Portals, for instance, are not the panacea they were trumped to be. However they do offer one substantial advantage, which is the idea of consolidation. This is a key KM concept. That being said, I would not put all my KM eggs into one basket. Let me use an example to illustrate the point.

As consumers of information and entertainment and news junkies we have no problem reading the New York Times on our PC screen at work. But when we're comfortably sitting on our favorite couch at home we will turn on the TV and watch the pundits on CNN dissecting the event. In the same vein, we should, within reason, provide what our users want and where they want/need it most.

So yes; Outlook and MS Word could be considered alternative channels; very popular channels for that matter.

And I totally agree with Teresa. We need to be where the users are. We consume information, entertainment and news from all kinds of sources. We may be sitting in our offices looking at the New York Times, checking out the results of the day, at least during our lunch break, and then go home and very comfortably sit in front of the television and see the pundits talking about the same. Well, I think it's the same with Outlook and other tools. I think Outlook, in that respect, is a viable option. It's something that should be considered as one of the interfaces which users are comfortable using in order to get access to information and knowledge. I would not take away or replace portals or Internets, but Outlook can certainly compliment them.



Q: Ted, at Hill & Knowlton how do you ascertain that your users are using a very ubiquitous and sort of commonplace application to its fullest potential?

Teresa, is that consistent at Dinsmore & Shohl, are you a little unclear of whether your users are using?

Ted Graham

It's difficult to say without doing one of these tailored time and motion studies over somebody's shoulder, and we're not really going to be able to do that. In lieu of that we look for other ways to measure usage. A lot of it is anecdotal and we know just by looking at volumes and things like that in terms of messages back and forth. We're trying to get a better sense of what types of functions they are using it for. We certainly saw the rise in the use of Blackberry, and in the use of calendar functions because users could synchronize with their assistant on the road and things like that. The most important thing is to keep asking questions. Is there a management initiative or even some local office thing that will spur them on to use these things?

To give examples, we're now booking conference rooms via Outlook calendars. We're putting a conference scheduler online where you can download a particular conference to your Outlook calendar if it's something that you want to sign up for. We can only tell by these little flag points where its attached to some other method of tracking, but I dearly wish there was some better reporting on what elements of Outlook actually get used. Maybe even some usability studies on what people actually focus on within that client.

One of the interesting things I think Tacit did was to point out how much information is exchanged back and forth via email. As you were typing in a note, it would underline the company you typed and link you to a group of people who had either sent or received an email on this subject or company. I think this brought to the attention of a lot of people who weren't measuring this any other way that, wow, there is in fact, so much going back and forth via email

that we just have no way to measure it. That's because we're all focused on Sharepoint portal where we can measure things.

Teresa Grote

We look at help desk issues to see "are we getting questions on applications"? Because most of our information is stored outside of Outlook we can look at content and the amount of information that is being accessed through our other applications. But yes, most of it is rhetorical.

But part of that is, "is Outlook the proper tool for exchanging that kind of information?" We've really tried to push people to the threads and bulletin boards on our Sharepoint site that relate to a topic or an area of law, and those are much easier to manage.

Q: Some claim that Outlook 2003 together with search tools like "Lookout" are creating a "personal Knowledge Management" paradigm – how do you see this aspect competing with an enterprise strategy for knowledge management and sharing?



Teresa Grote

Personal knowledge management should always be a view to the enterprise. If we are to keep our central repositories correct than the concept of personal must be virtual.

Shy Alter

I guess its personal knowledge management, which is something that we do naturally. All of us are doing it every day and one of the tools that we use for that is Outlook. I believe that managing the knowledge life cycle in an enterprise starts with personal knowledge management. Let me give you an example. When you build a manufacturing plant, you want it to be close to the point at which you can get your raw materials and also have an equivalent to a distribution channel. While I think that Outlook is potentially not the only tool by any means, it is a place where some of that can happen. It is a place where you consume raw data and information. Also it's a place where you can generate some of that knowledge. When you compose an email that's essentially what you do. And finally, it's a distribution channel, a very powerful distribution channel because its using email messaging and it connects you to a group of consumers of this particular knowledge that you may have just created or consumed. So yes I think it's very important to see it in that context. Now again, it's not necessary to have Outlook alone as the central point, but it certainly should seriously be considered in that kind of context.

Q: Ted, Teresa, do either of your organizations have CRM, client or customer, in this case client, relationship management applications implemented and are they integrated into your infrastructures that you have talked about today?

Ted Graham

Well I'll say that we're looking at them now within the context of the email systems. There was a question about contacts and Outlook and how much are they being used. I know personally, I find it very easy to take an email message from somebody I've never met before and have their details added to my personal contacts. But how do I roll them up into a firm wide CRM type system? So, we talk to people like Interaction who purport to give options in terms of what you include or what you don't include and there are some very touchy points about what is personal and what is firm wide. I think that a lot of these

companies still haven't quite sorted out where CRM from the top down meets contact management from the personal level. I think the point where we left off with firms like Interaction was how do you get people thinking, "ok there's going to be a benefit in it for me if I start sharing my personal contacts from within Outlook". I remember a sales person just telling me, "well you just tell them that by default everything is going to be public, they have to actively mark theirs as private". And I just kind of laughed to myself thinking, "you just have no idea". So that's where we are.

Teresa Grote

We have Interaction and we've had it for maybe 4 years now. It's kind of interesting because in a law firm it really is just a group of independent business people who share space and their businesses are their contacts, their clients. When you look at bringing in a new partner to a law firm you are looking at their book of business and it's their CRM. Because of this it's very challenging in many ways to get people to share that information. We've been pretty successful at it.

Of course, the only way we can measure that is through the growth of our contact management database, which has been substantial. The way we did that was through our Word integration. You want build in an advantage for people who go through Outlook integration, be they lawyers or assistants. You need to make that CRM system the most convenient place to put content, otherwise they are going to choose where it goes.

Frankly, none of our professionals care if its in Interaction, they just care that they can get the number when they want it. They don't care where it's coming from. It's important to create a two-way relationship between Word and your CRM so it's easy to put the address in for the first time, and it can be easily reused when generating documents or other information. That's the value proposition for an assistant or a secretary.

We do integrate it to a lot of different areas using Handshake so we have a case management or project management system that we've developed, and again I need contacts there, I need to know who's part of that matter or that project. So I've pulled those in from the project management system. We are evaluating another contact management system at this point, it's actually an application that Handshake as a company has written, and we're looking at that because it's considerably easier to associate contacts to different areas. It looks like Handshake will also meet our requirements for being able to have the different levels of public and private contacts.



Q: Are there concerns that buying into Outlook as a knowledge hub will force an exclusive use of the Microsoft platform? Are you trying to wean your users away from Outlook?

Teresa Grote

This would never be a consideration for us. We have not had "wean" users from Outlook, as they like getting their mail in Sharepoint. I believe that Microsoft is trying to wean users from Outlook to Sharepoint.

Shy Alter

I think it is a mistake to try weaning users away from Outlook. Why fight this one so hard? The only way to do so effectively is to develop a replica of Outlook somewhere else - like in a portal - and I'm not sure that this makes a whole lot

of sense. For those who're concerned with Microsoft's dominance in their organization's IT framework, Outlook could provide a gateway to non-Microsoft solutions. Looking at organizations like Hummingbird and their clients, they are doing a great job of leveraging Outlook in order to provide their own set of solutions.

Q: Email is a new frontier when it comes to trying to stem the tide of un-structured and often hard to categorize flow of information – how do you see email (and by extension MS Outlook), better managed as a knowledge resource in the organization?

Ted Graham

It's a great question that lots of knowledge managers have struggled with early on when trying to get a sense of what knowledge is out there. My view has been within Hill and Knowlton, and we see an ebb and flow of structured and unstructured information. Most of the time, unstructured is winning out. And that unstructured information comes in the form of these email messages and other sort of hard to categorize info. So we don't necessarily think in terms of trying to stem the tide of it being unstructured. But we will still capture the unstructured information if it happens that somebody needs a very particular piece of info, maybe its notes from a conference that somebody took, or even messages back and forth about a budget or a process that we are undertaking. I think it is important to note that structured and unstructured will always be within the organization. It's just trying to find the right balance.



Teresa Grote

Ultimately the e-mail store must be compatible with other stores. Think about it - it is one of the few DBs that is not ODBC compliant. In the meantime, much of what we want to use from Exchange is moved into other compatible stores.

Shy Alter

Start with some simple things like search. Outlook's built in search is severely limited. I believe that knowledge management starts with personal knowledge management practices, and better search tools will allow us to mine a treasure trove of information and knowledge - our own email correspondence. Another option that is somewhat similar to Ted's solution over at Hill and Knowlton is to provide ways for us to store some of our emails in structured threads for public consumption.

As Ted described, you can CC a repository, not just people. There was an attempt to mine emails in the organization as a way to identify expertise - I believe that Tacit is the company who was developing that product. They had problems though. People were not thrilled when their email traffic was scanned for such clues. They felt that their privacy was intruded upon. I am however curious as to how email or other document creation tools like MS Word could be used as nexuses for contextual queries, and about how they could provide access to relevant information and knowledge from around the enterprise. This goal seems attainable using tools like Microsoft's IBF. As an example, "smart tags" in an email message could trigger a query from a CRM. This is very powerful indeed.

Q: Using tools like Outlook or Office components like Word naturally form a part of one's workday and therefore business processes. Generating a word document as an example, is usually associated with providing some form of knowledge oriented business service to customers, trading

partners or peers; can you provide ideas as to how tools like Outlook or MS Word could be better leveraged through integration with knowledge and content management solutions?

Teresa Grote

There are just too many ideas to list. IBF allows any Office document to become a portal. The ability to drill down on customer, client or employee databases from within a document is tremendous. Conversely, the ability to populate a file from data sources and actually update sources is an incredible efficiency.

Shy Alter

Providing access to information and knowledge at the point we need it most is a key factor in making us more efficient. If I receive an email from a colleague or a client that requires me to provide my opinion or trigger a set of actions, why not make information that probably resides somewhere in the enterprise one click away? Why should I have to go look for it? If the information embedded in the email is the trigger, it should allow for this to happen quite seamlessly.

But here's another aspect to consider; knowledge that we as knowledge workers have generated should be captured and re-used. This is arguably the most difficult of tasks when it comes to this type of KM. Since many of my communications may reflect some of this knowledge, it should be made easier, maybe through simple drag and drop, to move some of this explicit knowledge into an appropriate workflow or repository for further qualification. This would be ideal since it was created in the course of my email communications or the creation of a document. It sure beats having to remember to do so after my workday is done.



Q: How critical is the role of Exchange to making Outlook a knowledge hub?

Teresa Grote

What is the alternative? POP3? I'm not sure what other feasible way there is to maintain communication, which is the true power of Outlook.

Shy Alter

Exchange is a challenge. On the one hand it offers a seemingly perfect match to Outlook. Exchange is a data repository as well as a communications gateway. It allows for the creation of "soft" collaboration spaces - called public folders. It also provides organizational calendaring. It is perfectly coupled with many of Outlook's built in features, even though Outlook could be used as a stand-alone of course. But from our experience, developing on top of Exchange is very challenging indeed. We successfully developed a full fledged collaboration solution for one of our clients, heavily relying on Exchange, just to discover that Microsoft, who for a while promoted Exchange as a basis for such solutions, decided to shift its strategy away. In short, Exchange should be considered when very specific and relatively non-intrusive functions are required. It is not critical in my mind.

Q: Can Share Point and Outlook collaborate with each other?

Teresa Grote	Sharepoint and Outlook can and do collaborate. Our environment is a perfect example.
Shy Alter	Absolutely. And for that matter any other portal as well. Most of them provide some rudimentary Outlook functionality to be incorporated into their interfaces, and in the case of SharePoint, Outlook could do the same - access some SharePoint content.

Q: Is it more important to bring Outlook's functionality into other interfaces (like your existing portal)?

Ted Graham	I have seen many iterations of portal vendors attempts at bringing functions such as the Outlook inbox into portal interfaces. The biggest knock has always been speed just in terms of how fast the screen refreshes, whether it automatically refreshes, and so forth. I know a lot of improvements have been made recently, but I still think you are getting a shadow of the Outlook client functionality. I think things like a shared team calendar probably make more sense to add into your portal. Simple things like room booking, for example. But I'm not a big believer in having people live within the Outlook inbox within a portal. I see it as a good supplement if you're traveling, but that's about it.
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Teresa Grote	Yes, without question.
Shy Alter	If this is to be considered, and it should be, then whatever is brought over should provide a rich experience, not a thin facsimile of the original. Also, it should closely tie into what your users want to do through the portal. As an example: If I can get my Outlook contacts through my portal, I should also be able to trigger queries into other enterprise repositories that will add context to those contacts.

Q: What is missing from Outlook that will turn it into a better KM tool?

Teresa Grote	A good, open database and commitment from Microsoft to make it a KM tool - I do not believe that commitment is there, as they are banking on Sharepoint.
Shy Alter	The most fundamental challenge is to connect Outlook to other information and knowledge resources. Doing this enables users to bring more context to their activities through Outlook.

Q: What are the Outlook base functions (e.g. email, contacts, calendaring) that could be further leveraged to enhance KM discipline and processes?

Ted Graham	I actually look to one thing that isn't necessarily mentioned here as an example here, which is the presence indication that you'll see in Outlook 2003. What they'll show you if you right click on somebody's name is an online contact, meaning that it's tied into MSN Messenger and can determine if people who are emailing you are online. I think this is going to be a very important step forward. You've got a lot of international companies trying to sort this out, and with good
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reason. Being able to find out if my counterpart in London is still in the office, and whether we can get an issue resolved within the workday is very important. And its just a way of making people remember that there's somebody who I can contact directly instead of just waiting for this sort of tennis match back and forth. We talked a little bit about contacts and contact management on our webinar and I think that will be another big thing that's brought out of Outlook in terms of more functionality. But really one of the things we have to work through is understanding how to roll out that type of group wide contacts and how you would meld what is personal/private and what belongs to the company.

Teresa Grote

You know my opinion - building anything specifically into Outlook is a short term strategy. Public folders are being phased out and Outlook functionality is already found in other applications, with the exception of e-mail.

Q: Have you any concerns about Microsoft's support for developing Outlook based solutions?

Teresa Grote

See above - very, very concerned

Shy Alter

It is clear that Microsoft thought of Outlook as a focal point for the knowledge worker a number of years ago - their "Digital Dashboard" framework was clearly promoted as such. Since then, they shifted their strategy away from Outlook as an "open" platform.

Developing solutions with Outlook should be pursued, but with the caveat that Microsoft will not offer as broad support as they do with other tools, like SharePoint. The introduction of Microsoft IBF (Information Bridge Framework) does hold some promise, for Outlook as well as other MS Office components. However it is interesting to note that 3rd party vendors who provide Outlook "plug in" functionality and therefore extend their own systems into this popular tool are scoring major points with their clients by doing so.

Q: When developing KM solutions for your organization, what examples will you use to illustrate business process integration through MS Office components like Outlook or MS Word?

Teresa Grote

Our IBF implementation for our collections function is a perfect example. E-mail is delivered with all the appropriate links to information to help determine if a credit limit should be increased. The function can be performed from within the e-mail. Absolutely web services and strong, robust APIs. This allows me to group information presentation in logical fashions depending on the application.



Q: What are the standards that you would prefer various vendors follow (e.g. Web Services) and in what way it will affect the kind of KM solutions that are suitable to your organization?

Teresa Grote

Absolutely web services and strong, robust APIs. This allows me to group information presentation in logical fashions depending on the application.

Q: Are there ways to apply organization sanctioned folder structures to public folders that users create. For example, would it be possible to have a folder for an M&A transaction would apply the M&Z folder template so that the user does not have to start from scratch each time?

Shy Alter

It is possible to create "folder templates" and thus allow some control over how those folders will look and behave. For instance, you can create a folder structure that includes unique folder types for documents, contacts or even tasks. This will probably require a bit of customization – but the fundamental structure of Exchange allows for that to happen.



Q: Please expand on the reason for not using Share point as Document Management

Teresa Grote

There are about 10 areas I found that were troublesome - some more than others and some easily corrected. Probably the biggest issue I found was their approach (or lack thereof) to having an off-line mode. There are also issues with the way they handle versioning (a big deal to legal) and document identification (numbering). Another big issue is that the documents are stored in the SQL database essentially creating a "blob". I'm not comfortable with this at this point.

Q: Have any of you gone beyond the challenge of sharing contacts in CRM and achieved value from collaborative sharing of info through CRM? How do you deal with the trust/quality concerns of individual professionals?

Teresa Grote

If you have a trust problem in your organization, no level of technology will take care of that. I believe our professionals have experienced the benefits and none of the perceived ills. This was a cultural shift as well as a good implementation of the security aspects of CRM

Q: How can Outlook contacts be used effectively as a shared Contact Database tool?

Shy Alter

There are a number of options. One is to encourage users to share their contacts; the other is to copy their contacts into a centralized contacts folder or set of folders that could be shared by all.

Probably the best way to do this is to create a folder containing Contact items underneath a public folder. If you can get people to use the same structure for these folders (by client, by project, etc.), people will learn where to look for contact information. This approach has several advantages:

Contact folders can be added to each user's Outlook address book, so the names

will be available whenever you send e-mail.

Contact information can be maintained by business resources rather than by Exchange administrators (as is the case with contacts in Active Directory).

- Distribution lists can be created which include both internal users and external contacts.
- Exchange public folders can be added to the distribution lists, making it easy to archive conversations.

Unfortunately, Exchange still separates Outlook contacts and Active Directory contacts. This is problematic because:

- Outlook contacts can't be centralized. The same contact, with different information, may exist in many different folders, with no way of determining which information is current.
- External contacts can't send to Outlook distribution lists (but can send to Exchange distribution lists).

If you're not using Exchange, Microsoft offers a tool called Business Contact Manager
(<http://www.microsoft.com/office/outlook/contactmanager/prodinfo/default.aspx>).

