

## Chapter 4.13

# A Knowledge Management Case Study in Developing, Documenting, and Distributing Learning

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### EXECUTIVE SUMMARY

*This case study reflects the work of a global organization in its knowledge management efforts to sustain and transfer learning from a global leadership development curriculum. It focuses on the Knowledge Management (KM) solution developed to support employees to sustain their learning, to enable them to share their insights and experiences with others, and thus increase organizational capability. The paper is written to illustrate an example of a large organization's efforts to engage employees to share their learning from a management programme across geographical and cultural boundaries.*

### INTRODUCTION

This case study reflects the work of a global organization in its knowledge management efforts to sustain and transfer learning from a global leadership development curriculum. It focuses on the Knowledge Management (KM) solution developed to support employees to sustain their learning, to enable them to share their insights and experiences with others, and thus increase organizational capability. The paper is written to illustrate an example of a large organization's efforts to engage employees to share their learning from a management programme across geographical and cultural boundaries.

Georgensen (1982) estimates that learners retain approximately 10% of material covered in

a tutor-led workshop when back at the workplace. The KM strategy in this project was to support high-performing, high-potential employees to retain a greater proportion of the tutor-led learning and experience. This in turn increases organizational capability by transferring the learning to colleagues and delivers a greater return on investment to the business.

A key challenge of the KM strategy was to effectively manipulate existing KM platforms within the business and research and propose the use of additional ones.

The issue was to make best use of the current multiple resources in the organization, acknowledging that not one of them was totally suited to meet the needs across the globe. The Learning and Development team worked to find a solution with either a range of existing platforms or, as a result of research and testing of new technologies, a new KM platform to support the strategy.

There are a number of cultural challenges associated with implementing effective KM across a global organization with presence in over 100 countries, with different levels of technology sophistication, language, and experience. Revenue-generating business demands mean implementing an effective KM strategy with “learning” content as another challenge entirely. For example, time spent documenting personal reflections from learning and on-the-job experiences, and reading others’ reflections from learning and on-the-job experiences struggles to compete with business opportunities that deliver an immediate bottom-line return.

The nature of the insurance industry is relationship based. Interaction has historically been, and still is, predominantly face-to-face or over the telephone. As Nixon (2000) confirms, many other industries have found implementing effective technology-based KM solutions with only face-to-PC interaction is a cultural and pragmatic challenge. In their everyday role, brokers prefer to pick up the phone and talk to someone or go to see them versus logging on to a computer, entering

a password they need to have remembered and change regularly to maintain security protocols. The Lloyds of London broking environment, established in 1688, reinforces the face-to-face relationship-based culture. Experience of working with an internal client group to support employees to use the system suggests that if the Internet connection is slow or a password is typed incorrectly thus denying access, users will pick up the phone before trying again, or worse, will avoid the system in future.

## **BACKGROUND**

### **The Organisation**

Marsh Inc. is the world’s leading risk and insurance services firm. Its aim is “[t]o create and deliver risk solutions and services that make our clients more successful.” Founded in 1871, it has grown into a global enterprise with 400 owned-and-operated offices and 42,000 colleagues, who serve clients in more than 100 countries. Marsh’s annual revenues are \$6.9 billion, and the company meets client needs in two principal categories:

- Risk Management, insurance-broking, and programme-management services are provided for businesses, public entities, professional services organisations, private clients, and associations under the Marsh name.
- Reinsurance-broking, risk and financing modeling, and associated advisory services are provided to insurance and reinsurance companies, principally under the Guy Carpenter name.

The organisation is made up of distinct divisions with specialist knowledge. One of the key business drivers for the future is to maintain and develop the specific knowledge within each of these divisions, while sharing more learning

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