

**Managing knowledge, maximising returns.**  
**Revolutions in business information management**

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**What is Knowledge Management?**

Knowledge Management (KM) comprises a range of practices used in an organisation to identify, create, represent, distribute and enable adoption of insights and experiences. Such insights and experiences comprise knowledge, either embodied in individuals or embedded in organisational processes or practice.

As a medium, the web lends itself to knowledge management extremely well. The statement, “to identify, create, represent, distribute and enable adoption” are all phrases that have been associated with internet media, from search through to content management and more recently through the organic growth in distribution of media\files through the global web network.

The technical capabilities to achieve this are now in place on the web. However, it’s the aspect of organisational process and practice that require the greatest degree of effort to understand and model to ensure an effective KM approach within your organisation.

“In the UK alone, poor knowledge utilisation costs the economy \$98 billion per annum. Better knowledge management is one of the last bastions of competitive opportunity, the rewards for which are, on average, an estimated 29% uplift in business performance.”

(Capgemini research 2009)

Knowledge Management systems enable this ROI uplift to be achieved by making information work harder.

If 100 individuals, each paid €80,000/year save 5% of their time working with business critical information, this will save the business €400,000 in the first year alone.

This paper is focussed on detailing how Aviva took this challenge on with their BORIS online KM solution and details the journey to get from inception to launch.

## The requirement

Aviva is the world's fifth-largest insurance group, the largest insurance group in the UK and the second-largest insurance group in Canada operating as Aviva Canada. It is one of the leading providers of life and pension products in Europe and has a presence in 28 countries worldwide. Aviva's requirement was simple: a better solution to assist in the provision of the insight team's output to the rest of the organisation. The solution needed to provide a standard process for the management of all information and simple tools to distribute it around the organisation more effectively.

The key driver for this solution was to improve accessibility to information and to provide some key improvements to the service offered by the insight team:

1. To improve access to key insight(s) and to ensure the organisation makes the most of the investment made in research and secondary data
2. To save time for an already stretched insight team, reducing ad-hoc requests and 'opening up' the knowledge available for self service to all Aviva employees
3. To raise the profile of the insight team within Aviva
4. To implement a process for the on-going management and communication of research projects and outputs

The web was chosen as the vehicle for this solution and in line with common web practice, an engaging theme was defined as part of the requirement. A motif and brand were designed to ensure that the solution would stick in the mind of the audience and become part of the culture at Aviva.

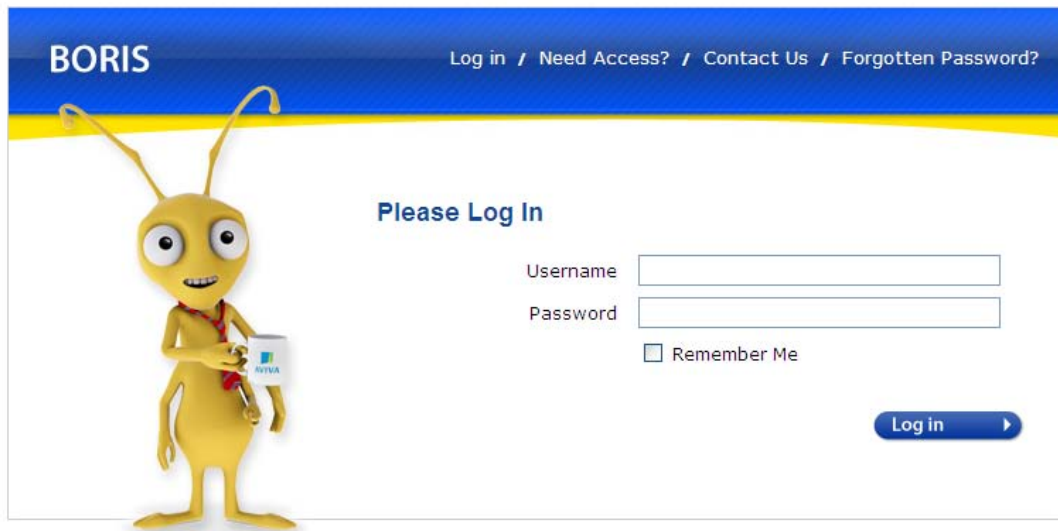


Fig 1 – BORIS – The welcome screen

The project was entitled BORIS – Bank Of Research and Insight Stuff and the ant motif was selected and developed with Aviva’s design and branding team. This was a key requirement of the system; to ensure that the web location, branding and design theme for the website would be engaging and easy to remember so as to ensure repeat visits.

### The Vision

The vision for BORIS was to provide a common platform for all outputs from internal sources, external agencies and information providers.

Overarching this vision was the requirement that complete visibility was granted to key stakeholders within Aviva throughout the key stages of each research project, by means of an interactive workflow management tool. This tool would be linked to the key outputs, so knowledge and learning from one project could be transferred to another with ease.

An improved communications network was envisaged, encompassing an online discussion and forum tool where results could be shared more easily and people with similar knowledge and experiences could be ‘connected’.

BORIS was also chosen to provide access to a dashboard utility aimed at communicating results from each of Aviva’s core tracking studies, through an interactive charting tool, updated by the agencies managing each specific study.

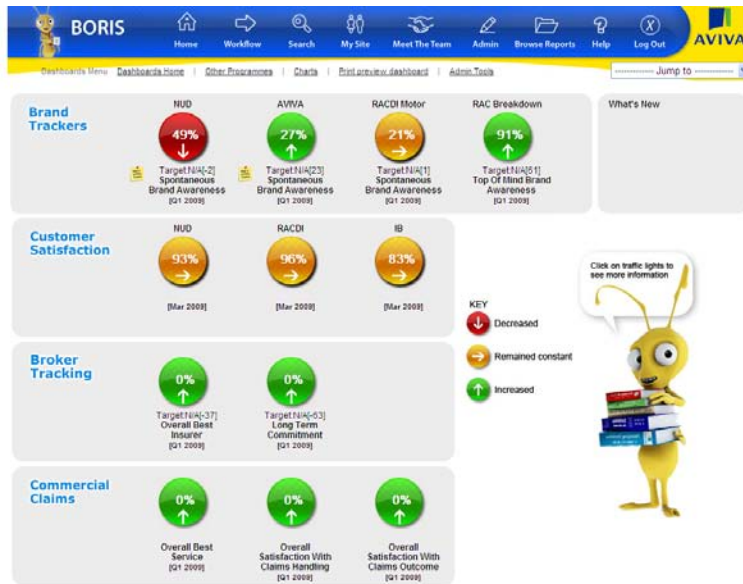


Fig 2 – BORIS Dashboard home page

The over-arching vision and goal was to make BORIS the one-stop location for all outputs from the insights team at Aviva and to provide the tools to ensure every user's visit resulted in maximum exposure to relevant information.

## The Barriers

The core barriers to the approach were focused around three key inhibiting factors;

1. Cost and time to ensure that the final solution would integrate securely with existing Aviva solutions, platforms and IT objectives
2. Ensuring that the approach did not step on the toes of any other business-wide software initiatives within the organisation
3. Ensuring that Nunwood's information security policies, standards and platforms matched up to Aviva's so that information could be hosted externally to the business

Outweighing these barriers are the benefits of using an external specialist with experience in providing this type of solution, from development through to hosting. Nunwood currently has more than 30 clients they provide this service to, so were able to assure that the IT policies (from application to server security) were already in place for Aviva. After a review of the current tools available within Aviva, it was deemed that the existing software and solutions could not provide the same level of functionality at the same cost and within the same timescales. It was also clear that the technologies proposed to create BORIS were compatible with the overall IT\infra-structure road-map within Aviva, giving the project the green light.

## **The agreed approach**

The approach decided upon was based on five stages:

1. To produce and develop a complete site mock-up, using flat images and managed in PowerPoint, so changes could be made quickly and new concepts drafted in hours - not days
2. Once the concepts for the site had been agreed, a full specification for the system was drafted to explain how each of the concepts would operate in reality
3. The development team began work after sign off and the research team catalogued the information and data they required for the initial launch of BORIS
4. The information and the first prototype release of BORIS was pulled together and tested, verified and signed off by the teams at Aviva and Nunwood through a series of testing, updates and amendments
5. A roll-out plan was drafted to ensure buy-in, train key users and to raise awareness of BORIS within Aviva

## **The Solution**

The final BORIS solution was split into five key areas;

1. Locate documents and reports – through the simple and advanced searches
2. Setup and configure alerts so that when new information is available, it is sent to you directly
3. Manage project timescales and stages through the work-flow management section
4. Review the latest tracking data through the online dashboard tools
5. Communicate with other BORIS users through the online community

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Fig 3 – BORIS Advanced Search

### Locate documents

The simple and advanced searches provide the ability to trawl through all keywords within each document contained within BORIS, making searching simple for the end user and providing relevant results quickly.

There are also additional fields that can be managed and searched including the document originator or author, the product within Aviva which the document relates to, which workflow project generated the document in question as well as the department or area within Aviva responsible.

## My Site

- Most Accessed
- Recent Items
- Searches
- Favourites Documents
- Change Password

Searches		Alert?	Remove?
tosh	<input type="checkbox"/>	X	
nu segmentation	<input type="checkbox"/>	X	
testSearch	<input type="checkbox"/>	X	
test search	<input type="checkbox"/>	X	
Segmentation	<input type="checkbox"/>	X	
test seg	<input type="checkbox"/>	X	
test seg 2	<input type="checkbox"/>	X	

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 » Click the alert status to switch an alert on and off.  
 » Click the X to remove a search from your favourites.

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### Setup and configure search alerts

For all searches managed through BORIS, a process for automating the results was required so that users could be alerted when new content was made available.

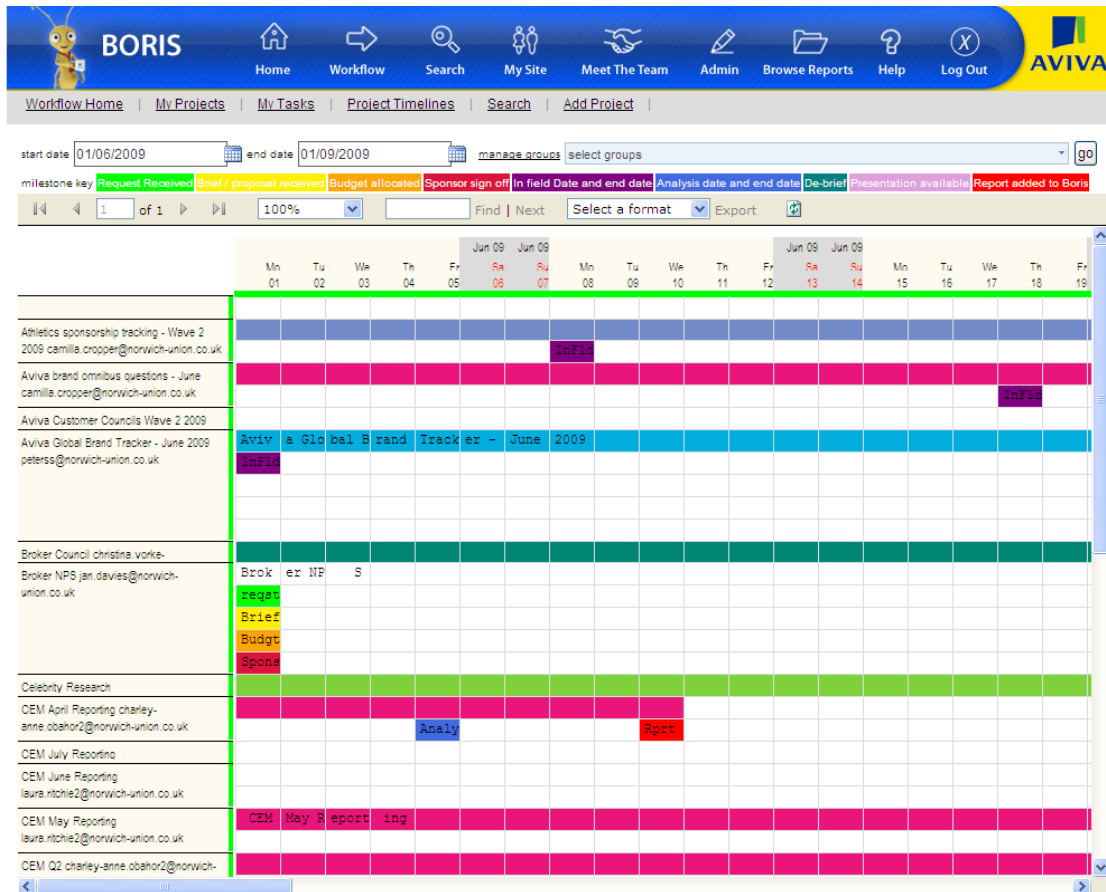
The search alerts were set up to be managed through the 'My Site' option within BORIS, resulting in key insights being pushed to users as soon as they are available. This increases exposure to useful information, improves usage and means that information is made available in a timely manner.

It has the added benefit of reducing user frustration as information automatically lands on each user's desktop, rather than having to manually check.

### Manage project timescales

All end to end projects on BORIS can be managed and communicated through the workflow tool-kit. This tracks all costs, key deadlines and final outputs, so that any internal project can be managed and communicated effectively.

The workflow tool shows how all resources within the team have been allocated, as well as providing a single screen view of all project stages and when final outputs can be expected. The reporting section of the workflow tool enables project budgets and performance to be measured and reported on, enabling project experiences to be transferred between team members and projects simply and effectively.



## Online dashboard tools

The online dashboard tools enable the top level and detailed metrics from each study commissioned by Aviva to be fed into an online charting system. Each programme\study can have as many or as few metrics and breaks reported as is required, providing an overview or detailed view of how Aviva is performing versus their competitors.

## Online community

The online community provides four key tools to better aid communication across sites, departments and countries.

1. Posts – enabling each user to create discussions on any subject relevant to the Aviva BORIS portal
2. Forums – to engage in active discussions with other users
3. Spot Polls – enabling questions to be answered quickly across all users
4. Search – enabling all community content to be searched through by key terms, words and phrases

## **The aftermath!**

To ensure the effective roll-out and usage of the final system, Aviva and Nunwood worked collaboratively to generate a buzz around the system launch.

Branded pens, cups and bags were handed out across key Aviva locations, all bearing the live URL and the motif for the site. The goal was to ensure that all users were aware of the system and knew how to access and download the information they required.

Core administrative users in Aviva were trained so that the key features of BORIS could be utilised effectively in house. Any on-going management of documents, information, users and system setup could then be handled by the insight's team, without the need for any technical know-how.

In the time since launch, 1212 documents have been made available through BORIS. There have been 4809 downloads in that time, from only 2214 searches performed. This demonstrates how the use of alerts have minimised the number of searches required to locate relevant and timely information.

The site has been accessed more than 2000 times by 400 unique users since its launch in Jan 2009 (data correct at the end of May 2009).

There have also been 49 projects marked for alerts by individual users, resulting in automated e-mails being sent out across the organisation as soon as any new content is available for these projects, whether added internally or by external agencies.

Issues facing the solution have been limited to elements such as internet access speed and minor bugs reported by users, all of which have been remedied with updates being made progressively to ensure a continued service.

The bigger picture is that now all of the information from the last 2 years is available in one, central place and it is saving the insight team countless hours in ad-hoc data requests, lifting the profile of the research to a more elevated level within Aviva. Time saved is now being spent on analysing the data and driving business performance and high level decision making, rather than on servicing mundane data and information requests.

## **The Future**

There are plans to roll BORIS out to other departments and territories to widen the reach of the information available, as well as to give more availability to relevant information in new markets as the Aviva re-brand spreads around the globe.

## **Conclusion**

Ensuring that knowledge management tools and processes are made the most use of in an organisation is not as simple as providing great tools and expecting them to be embraced.

Knowledge management requires time, effort and persistence to get right, but can yield huge performance and logistical benefits if pursued effectively, as well as serious returns on investment.

To ensure a successful approach, constant interaction with users and implementation of the reports and data your knowledge management system delivers to you is required to evolve the resource alongside the organisation, to deliver maximum benefits.

As the web moves forward, the tools and techniques available to provide even more relevant information and tools within your organisation will grow and change, as will each organisations information requirements. Managing this change and ensuring the KM resource moves with this will define the difference between success and failure of any solution.

With better knowledge management, brands can massively increase efficiency, and generate a greater return from their knowledge. Within the current tough economic times; further decreases in marketing budgets, cost efficiency and ROI are rising further up the corporate agenda. Effective knowledge management allows decision makers to demonstrate a greater ROI from their research and knowledge; providing an ideal response to the demands of more insight, more action and more profit.