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Delivering the Agile Workplace

How one association's Web-
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redefining knowledge
management

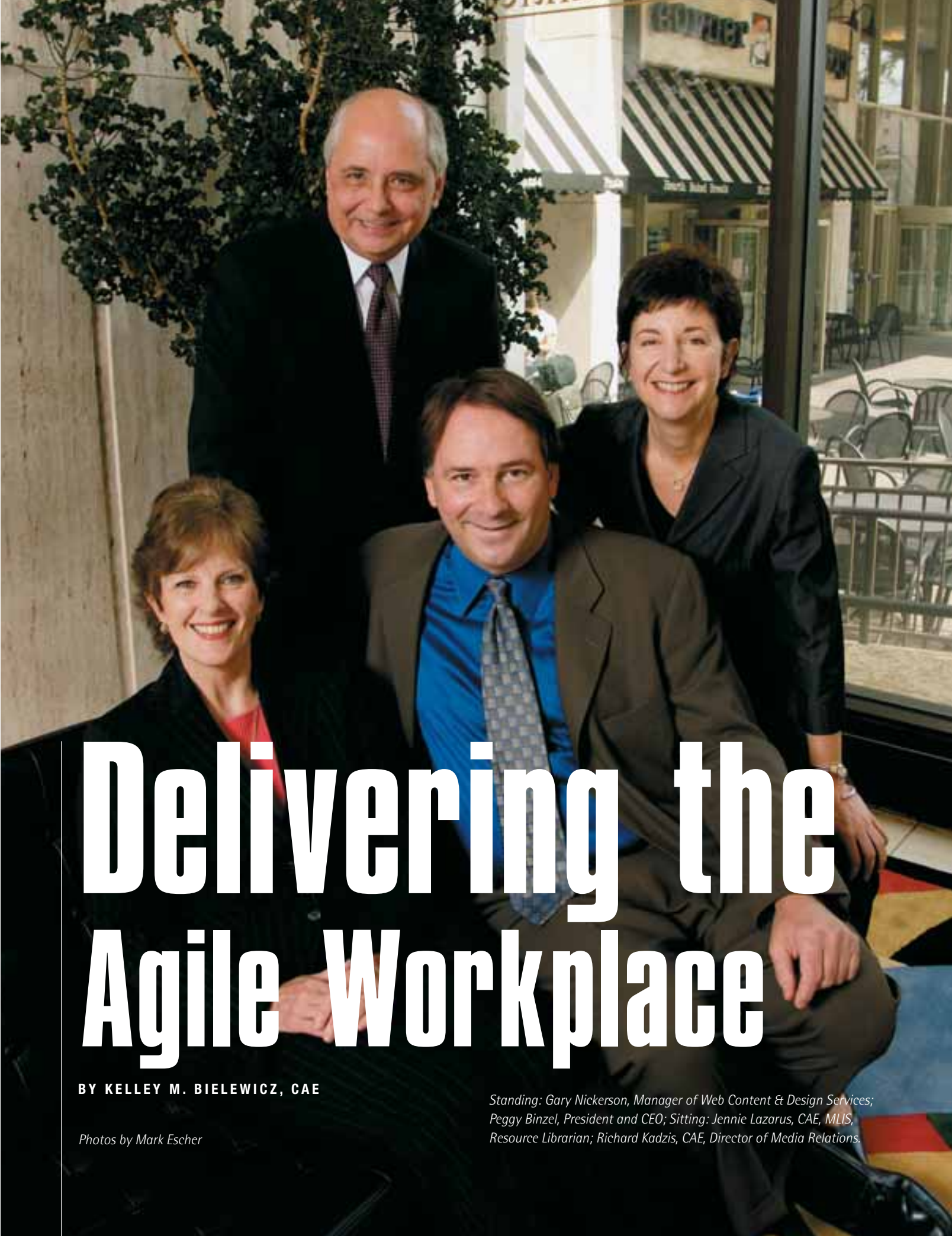
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Delivering the Agile Workplace

BY KELLEY M. BIELEWICZ, CAE

Photos by Mark Escher

Standing: Gary Nickerson, Manager of Web Content & Design Services; Peggy Binzel, President and CEO; Sitting: Jennie Lazarus, CAE, MLIS, Resource Librarian; Richard Kadzis, CAE, Director of Media Relations.

HOW ONE ASSOCIATION'S WEB-BASED KNOWLEDGE CENTER IS REDEFINING KNOWLEDGE MANAGEMENT

LIKE ANY ASSOCIATION, CoreNet Global is constantly thinking of ways to provide members with services that they can't get anywhere else. And like many associations, CoreNet Global's intellectual capital is its greatest asset. What makes this global organization of 7,500 corporate real estate professionals stand out is how it found a way to serve up its extensive knowledge base to all of its constituents in real time and in a highly organized, user-friendly, and therefore valuable manner.

The "agile workplace" is a phrase used frequently at CoreNet Global. It refers to a corporate infrastructure strategy that supports productivity anywhere, anytime. In fact, CoreNet Global's predecessor organization – the International Development Research Council, which merged with the International Association of Corporate Real Estate Executives (NACORE) in May 2002 to create CoreNet Global – was a pioneer in workplace management issues such as telecommuting.

"It's the world our members live in," says Richard Kadzis, CAE, Director of Media Relations.

So it should come as no surprise that CoreNet Global's new Knowledge Center Online is designed to be an integral part of the agile workplace.

According to Peggy Binzel, President and Chief Executive Officer, CoreNet Global's mission is twofold: to help individual members in their careers and to advance those members' enterprises by helping to align corporate real estate with the companies' overall missions. This means that members need to develop expertise in real estate in addition to related business disciplines, such as finance, human resources, information technology, etc. They become leaders in their organizations by developing their personal value to the company. Sharing and understanding best practices is essential to this process. Knowledge sharing is a key benefit of CoreNet Global membership.

Two years ago the leadership at CoreNet Global began kicking around the concept of how to offer a seamless delivery of services – in particular, knowledge-sharing – to members around the globe regardless of their level of career, travel budget or other variables. A Web-based system emerged as the clear choice.

A member survey in late 2004 validated the demand for an online delivery channel, but Binzel's team didn't wait for that explicit mandate. Being in touch with member needs on a constant basis, not just at survey time, allowed them to get a head start. This approach "lets the membership know we're anticipating their needs," says Binzel. "It shows we're ahead of the curve."

A CLEARINGHOUSE OF KNOWLEDGE AND INFORMATION

The Knowledge Center – which, as of press time for *GSAE Connections*, was set to launch in early September 2005 – is essentially an online information retrieval system. Users can search by topic, keyword, author, title, or document type for all of the resources in CoreNet Global's reservoir and the archives of its predecessor organizations. The Knowledge Center will also serve as a clearinghouse of information sources beyond what CoreNet Global has



to offer, such as those of cooperating corporate members and related organizations.

Access to the content is based on a "passport" system. This graduated, tiered arrangement reflects the association's long-standing approach that some materials are to be free to everyone, some are to be free to members but sold to non-members, while others are to be sold to everyone (with different fees for member and for non-member). Individual content items are assigned a passport level, and users can purchase a passport for 24 hours, one month, or one year.

The flexibility and convenience of such a system goes a long way towards serving members' needs.

"With the passport system, users will be able to select a tier and amount of time to browse the knowledge assets on the site to make sure they find what they want," says Jennie Lazarus, CAE, MLIS, Resource Librarian. "There's no purchase before you look, so the guesswork is taken out of blind purchasing."

Furthermore, the shopping cart is eliminated, whereby users would have to go through a purchasing process for individual titles.

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"It makes the Knowledge Center more like the library shelf, where one can take an item 'off the shelf' and browse through it before deciding to buy," says Lazarus.

For example, a user might select "Risk Management," one of more than 20 available topics. A list of dozens of results is returned, and it can be sorted by title, date or passport level. He or she might narrow the search by restricting it to only articles. The results screen gives enough detail – title, author, document type, passport level, and publication date – to pique the user's

interest. After clicking on one of the results, he or she is shown more details about that article: how many pages, cross-referenced topics, description and keywords. If it is free or the user is already logged in, there is a button to download. If not, there is a log-in button and information on how to upgrade one's passport level.

In addition to documents such as articles and reports, links to outside sites are categorized by knowledge topic and have descriptions on their display page, which

Lazarus points out is more user-friendly than a long list of URLs common to many association sites. Users can also find courses, summit sessions and other activities that relate to their area of interest. Also attached to the Knowledge Center is the online bookstore, where users can purchase CoreNet Global publications and research reports. There is an area for featured resources where CoreNet Global can publicize related products and association activities.

A "Contribute" feature invites anyone to submit papers, links, etc. that staff will review for appropriateness before posting. In this way, the membership itself provides content for the system – a true knowledge sharing arrangement.

The Knowledge Center is not limited to content that has already been published. One of the new features is called Communities Online.

"People are always hungry for sector-specific information," she says. The communities will have face-to-face meetings as well as webinars, threaded discussions, and online storage and retrieval of materials. They'll be facilitated by staff experts who might be asked to conduct research, meeting support, etc. The output of these communities – from commentaries to research papers – will further add to the content base of the Knowledge Center.

Communities Online will initially serve three pilot groups: those who manage real estate in the biomed/life sciences, retail, and government sectors. But, don't call them special interest groups! Binzel prefers "Web-enabled global communities." Eventually more communities will be added, she says, whether for ad hoc issues such as Sarbanes-Oxley or for more enduring constituencies such as those in the pilot program.

Yet another feature is Experts Online, in which member volunteers will answer members' questions. The result is content that – you guessed it – will be categorized and added to the knowledge base. "It's a way of converting tacit knowledge in heads into explicit knowledge," says Lazarus.

THE RIGHT TEAM AND THE RIGHT TOOLS

So how does one create such a system? As a first step, "we knew we had to hire a library scientist," says Binzel. CoreNet Global brought on Lazarus last year as a

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full-time librarian. Only then did they begin to categorize the information and sketch out the technical specifications.

"I knew what I wanted as a librarian," says Lazarus. It was the job of Gary Nickerson, Manager of Web Content & Design Services, to act as facilitator to make the vision come to life through the technology. He and the team looked at off-the-shelf programs as well as models made from scratch. In the end, they used something in between: one adapted from another custom design. Dotmarketing, a Miami-based company, became their technology partner.

CoreNet Global anticipates having much more content in the foreseeable future than they have now, and they need to be ready to deliver it. Therefore, Nickerson says, the system is engineered to be fast. Speed (or lack thereof) was a problem common to off-the-shelf-systems. He says that the Knowledge Center is designed to be scalable thanks to the custom-built indexing and search routines programmed into it.

"It can store and serve many times the number of documents we will have available on opening day," he says. Likewise, it is equipped to handle significant increases in traffic and data transfer.

It was important to get the right tool to match the fast pace of the industry. As with everything else about the project, the technology is there to serve the vision, not the other way around. As Kadzis puts it, "It's as much about change management as anything."

One manifestation of that strategy is the way the site architecture allows the administrator, Jennie Lazarus, to create, change or reorder topics and subtopics directly from the back-end. No programming is needed and the changes are reflected immediately on the site. This ensures that the basic categorization of knowledge keeps up with the way the industry evolves.

It was important to ensure that the content considered part of the Knowledge Center does not end up segregated from anything else produced by CoreNet Global. So, they installed Google Mini, a hardware-based product, to integrate the Knowledge Center with the rest of the sites managed by CoreNet Global or with whom the association has a partnership. This ensures that users have thorough access to all relevant information, regardless of how it is classified.

One of the many innovations of the Knowledge Center program is its source of funding. Whereas many organizations might have sought a commercial sponsor, this project is supported by a grant from CoreNet Global's New York City chapter. The chapter also assisted in developing topics and testing the beta site. This unique arrangement is "an excellent example of component relations success," says Kadzis. "We're serving the entire industry through a component relations program."



Richard Kadzis, CAE

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BETTER USE OF STAFF TIME

There's no doubt that such an undertaking requires a tremendous amount of staff time. In the development phase, Nickerson and Lazarus spent a significant portion of their time developing, testing and supervising the site's construction. Kadzis dedicated about half of his time. The marketing department was also involved early on in promoting the new program. In the post-launch maintenance phase, Lazarus will be largely in charge of the Knowledge Center, assisting members, updating the

site with fresh materials, and managing other features.

However, staff time is saved in the long run, enabling better use of resources. Before the online Knowledge Center, someone on staff had to look up, photocopy and send answers to common requests. Now, members can get "ready reference" items at their own convenience. In fitting with the agile workplace concept, members can access the Knowledge Center from a laptop in a board room or a hotel or anywhere. Staff can be put to use assisting with more extensive research and other member inquiries.

Binzel says, "We can't have one librarian serve thousands of people. This system takes the time barrier away, in terms of both time zones and staffing time."

HOW TO MEASURE SUCCESS

The success of the program as a whole will hinge on the usability and accessibility of the system, says Kadzis. Measuring that success is a little more complicated.

For example, Binzel says that the communities will be evaluated on "level of interest, whether they are truly global, whether a sufficient number of people find added value, and if we find a fiscal model that works. It's an experiment, so we'll see."

Metrics will include Web statistics, membership recruitment and retention, satisfaction surveys, and participation from users, as well as the overall public relations benefit.

- **Web statistics:** Kadzis expects to see interest from the media, students, professors and consultants who use the Knowledge Center as a reference tool. He would like to see usage meet or exceed other popular areas of the CoreNet Global site, such as job listings.
- **Membership recruitment and retention:** Lazarus anticipates that "it will be one of the main reasons for members to join or renew their membership." She predicts that the program will appeal to people in all membership categories, but especially to younger people, a demographic group known to show a strong preference for online sources of information.
- **Satisfaction surveys:** "Anytime we can offer something of value for our members, their satisfaction level is heightened," says Lazarus. "One the things

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they want is more benchmarking information and opportunities to share knowledge, and this provides it for them."

- **Participation:** "Because of the interactive nature – asking questions online, sending to a friend, contributing a resource – we hope that our members will feel a sense of ownership and pride in this new service," says Lazarus.
- **Public relations:** Nickerson expects that the Knowledge Center will be "a generator of talk, raising global awareness of CoreNet Global."

"It's a terrific cross-promotional platform," adds Kadzis. "In a knowledge context we can present our entire agenda over time." He says the program offers an opportunity for cross-promotion that links products and services to the knowledge experience. For example, when promoting a seminar, "it's not just 'register now' but 'register now and learn more about X.'"

Binzel points out that the Knowledge Center isn't intended to replace any income generators. On the contrary, she expects it will contribute to the overall collection, as when members of an online community propose products such as research reports.

A DREAM COME TRUE

"This is a dream come true for a librarian to create something from nothing," says Lazarus. Her enthusiasm is shared by her colleagues, who talk about the Knowledge Center with palpable pride. "It's been a true team effort," she says.

"This system will someday be seen as an industry best practice for any organization," says Kadzis. "It will be the way business is done." For now, though, he says, not too many groups are doing this sort of thing or doing it well.

That opinion is supported by a 2004 report that was the result of collaboration between Ellipsis Partners and the Center for Association Leadership ("Industry Benchmark: Association Study on Members Only Web Efforts"). It found that most associations still segregate "members-only" content from the rest of their sites or hide such content until the users log in. Relatively few groups reported both integrating restricted content with free content and displaying at least a teaser to everyone. The report also found that two-thirds of

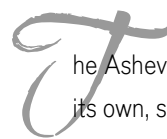
organizations do not use any sort of content management system to manage their sites, and one-third of them do not have a set policy for determining what is classified as members-only. Forty percent of respondents indicated that they have no way of measuring usage of restricted content.

CoreNet Global aims to be on the leading edge of trends for improving those statistics. For the foreseeable future, CoreNet Global maintains what Nickerson describes as "a long and mutually beneficial relationship with Dotmarketing that

we expect to continue." Binzel expects that as more and more members begin to see the potential and reap the benefits of the Knowledge Center, they will become active users and contributors.

But ultimately, says Binzel, "It's about serving members and giving them what they want. If one model doesn't work we'll find another that does." ●

Kelley M. Bielewicz, CAE, is a freelance writer and former association executive. She can be reached at kelley@forte-editorial.com.



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