



***KNOWLEDGE ADVISORS AT HEWLETT-PACKARD***  
Connecting People with Information

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## 1 INTRODUCTION

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### 1.1 SHARING OR MANAGING?

In the past dozen years, as Knowledge Management (KM) has gained ground as a business discipline, there has been a natural evolution in the way it's understood by KM practitioners. Since the beginning, though, there has been a recurring argument about the name itself. Since it is such an intangible, is "knowledge" really something that can be "managed?"

That's a good question, which can lead into lots of interesting side issues about the nature of innovation and the value of ideas. Patents, for example, are just documents. You can manage a patent library. But can you manage the process by which the ideas behind those patents were developed?

It may also be that in a business context, *managing* knowledge is missing the point. The goal should be finding a way to tap into the collective minds of the employee population. Capturing and codifying that knowledge seems a good idea at first, but leads to other problems. The more aggressive knowledge capturing programs are, the more daunting and un-navigable the resulting knowledge base becomes.

Knowledge is unique, in that you can give it away and retain it at the same time. However, it's well documented that some people resist the idea of transferring what they know to other people or (even more so) to corporate knowledge repositories. It's the "knowledge is power" problem.

Some companies have therefore taken a different perspective on the issue, dropping the concept of collection and codification in favor of knowledge "sharing." It's a simple change, but one that has an important philosophical implication. When a person shares something, there is no transfer of ownership implied.

This paper is one in a Knowledge Street series aimed at examining such knowledge-sharing organizations. We hope the information contained herein may be useful for any concern seeking to leverage the value of Knowledge Management.

## 1.2 ABOUT KNOWLEDGE STREET

Knowledge Street LLC is a consultancy which applies the concepts of Knowledge Management to the solution of business problems, building on a foundation of effective Communication.

The Knowledge Street partners have over six decades of individual experience in the core disciplines of our business space. Our collective resume includes:

- Writing in all shapes and sizes, with world-class thought leadership in hypertext theory
- Graphic design, with expertise in all manner of printed material, multimedia and on-line information delivery
- Human development, with experience in teaching, training, process design, curriculum development and change management

Knowledge Street offers a pragmatic, "street smart" approach to problem solving and an understanding that technology is an enabler until it gets in the way. For more information, visit [www.knowledgestreet.com](http://www.knowledgestreet.com).

## 1.3 STRUCTURE OF THIS REPORT

This report begins with some background information on Hewlett-Packard, and the evolution of the Knowledge Advisor program. It then presents details on the program's operations, staffing, communications, technology and metrics, with a final section of conclusions and lessons learned.

## 2 BACKGROUND

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### 2.1 HEWLETT-PACKARD OVERVIEW

Hewlett-Packard is one of the most storied US technology companies, having grown to a multi-billion dollar global concern from very humble roots. The company was founded in 1939, with \$500 in working capital, by two Stanford University graduates: Bill Hewlett and Dave Packard. A coin toss decided who got top billing.

They began by fabricating and selling a line of innovative electronic devices, which applied technology in ways that let them undercut the prices of their competition. Given its roots in a Palo Alto garage, HP is the symbolic founder of what would become Silicon Valley. In fact, *Wired* magazine considers HP's 9100A programmable calculator, produced in 1968, to be the world's first personal computer.

In 2002, HP merged with Compaq, over the objections of a shareholder group led by Walter Hewlett, the son of founder Bill Hewlett. The goal was to make the company the leader in personal computing, but the hoped-for benefits have so far failed to materialize. HP held the #1 PC slot only briefly, before being supplanted by current leader Dell Computer. Besides Dell, HP's other major competitors in the PC market are Gateway, Lenovo, Sony and Toshiba, while HP's servers also compete with Sub Microsystems and IBM.

In addition to its hardware business, HP supports a large software portfolio, which includes operating systems, printer utilities and the OpenView suite of tools for application, business and network infrastructure management. It also has one of the world's largest IT service organizations. The company is still based in Palo Alto, California, and reported 2005 revenue of \$86,696 million.

### 2.2 FOUNDATIONS FOR KNOWLEDGE MANAGEMENT AT HP

Lew Platt, former HP CEO, generally gets credit for one of the most widely quoted catch phrases in Knowledge Management: "If only HP knew what HP knows." That nugget of insight alone would earn the company a place in KM history; its belief in the value of collaboration has very deep roots. HP's KM

practices have been the inspiration for many articles and books, and the company has made serious investments in both tools and techniques to promote knowledge sharing. Its work in this area includes traditional repository-style knowledge bases, but also features elements such as open-plan offices that eliminate eye-level partitions in order to increase human interaction and knowledge sharing.<sup>1</sup>

HP has a long-standing cultural commitment to intelligent risk-taking, and credits this culture with the speed with which it's able to bring products to market.<sup>2</sup> Even so, it is not immune to the "asking problem:" whatever the culture, people can be reluctant to ask questions for fear of revealing their own ignorance. In recent years, this has led HP's KM efforts to focus more on "connection than collection," since people are more likely to ask questions of those with whom they have an established relationship.<sup>3</sup>



Figure 1: HP's Model for Knowledge Management

As might be expected, HP's KM program is both broad and deep. Its fundamental view is non-controversial, suggesting that successful KM relies on three supporting concepts: People, Process and Technology. Each of these is considered a domain within the area of Knowledge Management, and HP has a leader assigned to oversee developments in each area.

<sup>1</sup> Karl-Erik Sveiby, *What is Knowledge Management?* April 2001

<sup>2</sup> David Skyrme, *Knowledge Management: Making Sense of an Oxymoron*, 2003

<sup>3</sup> Stan Garfield, interview, November 2005.

### 2.3 KM PHILOSOPHY

Since KM became an explicit part of the business scene in the mid 1990s, HP has looked for ways to support its local, often informal sharing tradition with programs that would allow for a broader reach. The company considers its knowledge according to four “types,” based on where the knowledge is found and how it is represented. These types are:

- *Institutionalized Knowledge* - which includes methods and procedures, reusable templates, standard sales and/or delivery materials and formal knowledge repositories.
- *Proven Practice* - which includes “Knowledge Briefs” (background documents on various topics prepared by Subject Matter Experts), as well as reusable code and sample documents.
- *Community Knowledge* - which includes distribution lists, informal on-line discussion forums and web-based presentations.
- *Personal Knowledge* - which describes what is generally referred to as “tacit” knowledge, the information that is held by individual employees and Subject Matter Experts.

HP ultimately sees the value of KM in the company’s increased ability to deliver value for its clients, by the intelligent application of the company’s collective understanding. It refers to this as the “Engagement KM Initiative,” a concept that’s illustrated in Figure 2. This model is intended to increase the company’s win rates, drive down sales and delivery costs and increase engagement quality. The goals are to increase revenue, profitability, quality and customer satisfaction by:

- Promoting the reuse of both materials and expertise, and leveraging existing knowledge and experience.
- Avoiding redundant work efforts (as well as “making the same mistakes twice”).
- Promoting standard, repeatable service offerings by providing methods, tools, templates, examples and information which can streamline both sales and delivery.
- Communicating important information quickly, so as to stimulate innovation and growth.

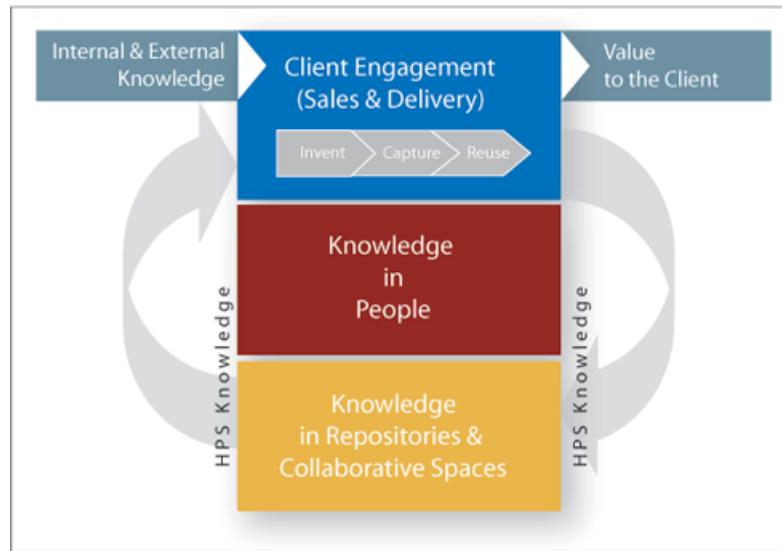


Figure 2: HP's Engagement KM Initiative Model

The HP program includes specific initiatives to support project teams (by promoting collaborative workspaces), create Knowledge Briefs (by encouraging their development and supporting repositories for their storage and retrieval), sponsor Communities of Practice, manage general project repositories and document libraries and otherwise provide a platform for effective KM.

As the saying goes, you could write a book about how KM works at HP; the goal of this paper is only to address a single element of the knowledge portfolio. It will describe the company's Knowledge Advisor program, which has been designed to provide a human interface for its other KM tools.

### 3 KNOWLEDGE ADVISOR BASICS

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#### 3.1 BACKGROUND

HP Services has three primary Business Units, known as Consulting & Integration (C&I), Managed Services and Technology Services. Knowledge Advisors are part of the C&I unit, which is where HP's Engagement KM activities have traditionally been managed. This unit is seen to be more naturally receptive to knowledge sharing, given the consultative nature of its activities.

Before the merger with Compaq, a similar function was played by what were then known as "Knowledge Brokers," a role that provided help-desk style support for consultants who had general questions, tool-based inquiries or other needs for technical assistance. After the merger, the program was continued in much the same way, but the name of the role was changed to Knowledge Advisors (or sometimes just K-Advisors, for short). Most of the processes and systems came from the HP side.

As stated above, the Knowledge Advisor program is only one component in HP's KM landscape. The architecture for KM here includes collaboration spaces, Communities of Practice, traditional knowledge repositories and various tools to support project knowledge capture, source code reuse, proposal development and so forth.

#### 3.2 K-ADVISOR RESPONSIBILITIES

The function of a Knowledge Advisor is interpreted with some variations in different geographies, as shown by the job descriptions that are included as an attachment to this report. In summary, though, the advisors are responsible for four activities:

- Helping users search for information, especially when the requester is outside the HP firewall.
- Maintaining awareness of all types of collateral, such as proposals, references, information about HP solutions and partners, new product developments, project information, etc.

- Making people and community connections, so that experts can be leveraged for maximum effect.
- Training general users in the use of KM tools, including installation, artifact submission, search techniques and general maintenance.

In a typical day, the advisors will be involved in monitoring the shared K-Advisor mailbox, logging calls and queries at the K-Advisor website, answering new queries and conferring with their colleagues on open queries. If an individual K-Advisor is overloaded, he or she will call upon other K-Advisors for support, primarily within his or her own region.

The mix of tasks varies depending on the seniority of the individual advisor. Junior advisors tend to be more reactive, and focus on responding to incoming queries. Senior advisors are more proactive, and will reach out to project teams, perform training and conduct surveys to monitor the satisfaction of their internal “customers.” Senior advisors are also responsible for monitoring the quality of submissions to knowledge repositories, and will check on the usability and completeness of project profiles. (Their assessments in this area feed an overall KM program metric, based on the number of project profiles created.)

### 3.3 OPERATIONS

Advisors field questions from end-users (who are typically field workers and consultants), and questions are generally asked via email or telephone. Email is the most popular vehicle, since it's the technology that most easily transcends time zone issues. For K-Advisors who reside in HP offices, there's also a certain degree of walk-in business.

The advisors have a secure, dedicated website (called, simply enough, K-Advisor) which provides its own mechanism for submitting a query via email. All queries are routed to a common K-Advisor mailbox, and those submitted via the website are tagged with the end user's country or region.<sup>4</sup>

Each submitter receives an automated reply, which promises a response (although not necessarily an answer) within 24 hours. Messages marked urgent are given priority and handled as quickly as possible. There is no formal mechanism for marking a request urgent, but users generally indicate urgency either in their subject line or in the body of the message itself.

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<sup>4</sup> Although there is a single, shared email box, there is no single telephone contact point for the Knowledge Advisors. If telephone contact is the user's preference, he or she must call a local K Advisor directly.

The program operates within normal business hours in each geography. However, since the K-Advisors are distributed around the world, they can theoretically respond around the clock. Advisors are primarily responsible for answering queries within their own geographies, but are encouraged to respond to anything, especially if an urgent query is received after business hours in its home region.

Depending on the type of question, responses are most commonly provided via email or telephone. For things that are more involved, NetMeeting may be used to establish the return connection. Queries of this type are referred to as “consultancies” and are not counted in the normal call metrics. The same is true for requests to assist in developing a CoP or selecting a collaboration technology.

The Knowledge Advisors have regular, informal calls to keep in touch. As already mentioned, if a query cannot be addressed locally, a “peer check” is initiated, and the query is forwarded to other regions.

### 3.4 REPORTING STRUCTURES

Generally, Knowledge Advisors report to the KM lead in their home country or region, although this depends on the size and scope of each territory. The KM Lead generally reports to the Region Operations Manager, although this is also subject to local variations. One of our sources, Gita Haghi, reports to the EMEA Operations Manager, but also has a dotted line to Stan Garfield, the Business Unit KM leader.

### 3.5 COMMUNICATIONS

The K-Advisors use standard communications tools for keeping the rest of HP aware of their existence. This includes posters, regular emails and the promotion of the service at local business meetings. The advisors also look for coverage in HP newsletters, both local and global. Former Knowledge Advisor Marko Kiiski feels the in-person experience of local meetings goes a long way toward building trust and gaining recognition, by "connecting the name to a face."<sup>5</sup>

The leaders of the program have recently realized that taking it to a broader audience will require some more aggressive sales work. The “customers” of the

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<sup>5</sup> Marko Kiiski, Interview, December 2005.

K-Advisor service are generally more than satisfied, but there are also a lot of "non-customers" to be converted and new markets to open.

With that in mind, the advisors sent out 8,700 mailers in December 2005, each of which included a laptop sticker advertising the program, providing the intranet address and including a place for people to add the phone number of their local advisor. After the stickers were distributed, there was a significant increase in the number of Knowledge Advisor calls received. In January, calls in the Americas were up 240%, while APJ calls were up 58%, and EMEA calls were up 53%, for a worldwide increase of 73% overall.

Other than this recent effort, the advisors get the word out through multiple channels. The program is mentioned in general KM training (used by all consultants). A Knowledge Advisor is generally present during new project kick-off calls. The advisors also conduct ad-hoc and scheduled employee surveys; the latter are targeted at 300 people several times a year, with a new population selected each time.



### 3.6 METRICS AND MEASUREMENT

HP has begun the incorporation of an explicit KM component in employee performance reviews, but this has not yet been implemented consistently. However, the regional VPs have set specific KM goals for their regions.

HP has also begun experimenting with a pilot recognition program based on points, rather than cash rewards. The point system recognizes employees who display KM behaviors (sharing, re-use, etc.), and recognition takes the form of posting the employees' names and ranks (according to points) on an intranet site. The by-product is that within this context, people can also be asked to rate any explicit materials that were involved, which helps the KM team determine the value of existing materials.

For the K-Advisor program specifically, the metrics are what would be expected given its Help Desk antecedents: number of queries logged, time to resolution, number of outstanding queries, etc.

## 4 STAFFING

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### 4.1 STAFFING MODEL

At the time of this writing there are about a dozen people involved in K-Advisor roles; some full-time, some part-time. Some also act as KM leads in their countries or regions, and only one advisor is 100% dedicated to the K-Advisor program.

In the early days of the Knowledge Advisors, the program was staffed by consultants on a rotating basis, with candidates often selected because they were not otherwise engaged. This is how Gita Haghi, one of our sources, first became involved - she was a Project Manager who was between assignments.

Ultimately, HP decided this was not the best approach, for several reasons. Training to full effectiveness takes two to three months, and by the time people were thoroughly trained they were often ready to move on. HP also recognized that people are more prone to work with advisors with whom they've developed a relationship; constantly adding new faces to the mix was an inhibiting factor.

Each country or region determines its own need (and degree of funding) for the K-Advisors, although the advisors themselves do work to help management recognize and understand the importance of the function.

### 4.2 SKILLS, TRAINING AND EXPERIENCE

An understanding of the local environment is key for a successful K-Advisor, followed by interpersonal skills and communications skills. The latter are most important in being able to identify any underlying issues and to ask good clarifying questions.

The local-level knowledge helps each advisor understand what's going on in the business as well as identify the most valuable resources. Advisors also need training skills since they frequently act as mentors to the end users, ultimately helping them to find things on their own. Advisors also need to understand and have experience with HP's existing knowledge systems. Consultative skills come in handy when dealing with skeptics.

There is no formal K-Advisor training. People are trained with a "peer mentoring" approach, in which the more senior advisors coach the less senior. However, the advisors are encouraged to attend general KM seminars and conferences, taking the opportunity to learn what other companies are doing.

## 5 TECHNOLOGY

### 5.1 WEB-BASED TOOLS

The Knowledge Advisors began with the Remedy Help Desk software as their platform of choice, but ultimately decided it was a more powerful and sophisticated tool than they needed. Too much time was being spent entering unnecessary analytical data. From Remedy, the advisors turned to Microsoft SharePoint, and now maintain a basic logging list as their main tracking mechanism. Reports are generated monthly to determine how many requests have been received and cleared.

The screenshot shows a Microsoft SharePoint-based intranet site. At the top, there's a banner with the text "Mission: Connecting you with the knowledge to succeed." Below the banner, a message encourages users to save time by connecting to the right knowledge sources. On the right side, there's a profile picture and name of "Gita Haghi, Knowledge Advisor Lead". A link to "Ask Gita!" is also present. The main content area has a header "Knowledge Advisor Services" and "K-Advisors by Region and Country". The page is divided into several sections: "Application Consultancy", "Reusable Collateral", "Connect to Knowledge Sources", "Knowledge Capture & Reuse Support", "Training & Communication and User Support", and "C&I EMEA", "C&I Americas", "GWE and ISE", "C&I APJ", "Latin America", "United States", "C&I APJ", "All other APJ countries", "C&I EMEA", "UK & Ireland", "Switzerland", "All other EMEA countries", and "Contact a K-Advisor". Each section contains contact information for specific individuals, such as phone numbers and email addresses. A "Send e-mail or log an e-call" button is located on the right. The bottom right corner shows the page owner as "Gita Haghi" and the last update date as "13 July 2005".

Figure 3: The K-Advisor Intranet Site

The SharePoint application is accessible to authorized users via the K-Advisor website, which is itself open to all HP employees. However, the site is not

actively promoted as a Knowledge resource. It's intended as a promotional vehicle for the K-Advisor service, not as a self-service tool for general users.

## 5.2 OTHER TECHNOLOGIES

The program focuses on the human factor, but email remains an essential technology. However requests are initiated (by phone, by email or face-to-face), sooner or later a person must be sent something, and email is the tool of choice.

NetMeeting is employed to show end users how to use a tool or navigate a system. Some K-Advisors use instant messaging to chat with each other, but the general population does not use IM to connect with the advisors themselves.

## 6 CONCLUSIONS

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### 6.1 GENERAL RESULTS

Knowledge Advisors are now a well-established part of HP's KM infrastructure, providing an important human interface for the other tools in place. Like the ikonnect service at Bovis Lend Lease<sup>6</sup>, HP's Knowledge Advisor program shows there is still a role for direct, person-to-person connections.

The HP experience also demonstrates that while technology is a necessary enabler for sharing and collaboration, doing a few simple things well can sometimes deliver the most value. An over-reliance on technology may do more harm than good.

### 6.2 LESSONS LEARNED

Our sources cited a number of things they felt were important in establishing a successful advisor program:

- A model based on permanent staff, even if not long-term, is better than a model based on rotating consultants. People want to establish a relationship with the person from whom they're asking support.
- A country-based support model is important. Culture plays a major role in knowledge sharing and it's important for people to be able to speak with someone in their own language.
- Human interaction is key. The answers that people seek are often available someplace, in a FAQ or a CBT module. However, people want the reassurance of being able to ask a question of another human being. It raises their comfort level, reduces their fear of missing something important and lets them feel that another person is sharing in the responsibility of the search.
- Inside sales work and ongoing communications are essential. The best technique is to communicate briefly, but often, with messages that are

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<sup>6</sup> More information is available in the K Street report entitled *Bovis Lend Lease ikonnect: Facilitated Knowledge Sharing*, September 2005.

short and consistent. Many of the target users work on client sites and don't necessarily read every internal HP memorandum; the message has to be reinforced constantly.

- After-answer reviews are necessary. They are the best way for the advisors to be sure they are delivering value and to identify process improvement opportunities. These reviews should be done systematically, and are the best way to answer the all important question: "Is it working?"

Finally, local management support is imperative. Being endorsed as a "world-wide" initiative is all well and good, but not as important as having genuine support from local management.

### 6.3 ACKNOWLEDGEMENTS

We could not have developed this document without the support of Stan Garfield, KM Leader for HP's C&I unit. He was willing to listen to our ideas, was open to the writing of this report and introduced us to our two primary sources. They were Marko Kiiski, until recently a Knowledge Advisor in the UK, and Gita Haghi, the lead Knowledge Advisor for EMEA and the worldwide K-Advisor Program Leader.

Special thanks to Marko and Gita themselves, for giving freely of their time and providing access to supplemental materials.

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## 8 APPENDICES

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The following pages contain three exhibits obtained from HP. The first is a generic job description for the Knowledge Advisor position, the second a more specific version of how the role is interpreted in the UK and the third a still more specific description of the role Knowledge Advisors play in Asia Pacific.

## **HP Knowledge Advisor Job Description - Generic**

### **Role Description:**

- Assist with our strategic tools and processes within the Knowledge Network
- Help users get up to speed on the Project Profile Repository, SharePoint, Forums, Knowledge Briefs, and other KM tools
- Facilitate collaboration needs
- Direct users to the right knowledge sources based on their specific needs
- Assist users in searching for collateral and knowledge
- Actively offer assistance to project teams
- Review project profiles submitted for compliance to quality standards, and follow up as required to improve quality
- Solicit user feedback
- Conduct training
- Participate in other user support initiatives
- Participate in the Worldwide Knowledge Advisors team

### **Skills Profile:**

- Good people and communications skills
- Able to quickly learn about tools and processes
- Eager to be of help to users
- Experience in one or more of the following areas: knowledge management, collaboration, help desks, intranet/Internet searching, peer-to-peer networking

## **HP Knowledge Advisor Job Description - UK**

### **Major Responsibilities:**

- Adhere to the Knowledge Advisors processes
- Resolve and, where appropriate, escalate queries raised by users where they include:
  - Queries on how to use KM tools
  - Requests for help in finding people or documentation
  - Requests for help in design and set up of km tools for a business purpose/problem
  - Queries related to bugs, access issues and file restoration with KM tools
  - Requests for more information about KM processes
- Provide feedback on the issues raised by the business to the wider KM function
- Where requests are made that do not fall into these categories, they should be passed on to the relevant group/individual

### **Organisational Linkage:**

- Part of a Worldwide team of Knowledge Advisors
  - Provide support to other team members
- Well connected to main organisational areas of business

### **Minimum Role Qualifications/Skills:**

- understanding of KM strategy, principles, and enthusiasm for KM and its benefits
- good understanding of TSG business and its needs/drivers
- good communications skills
- good technical understanding of tools and how to apply them
- training skills
- consultative approach
- facilitation skills
- fast thinker and flexible attitude
- happy to ask for help & to support colleagues

## **HP Knowledge Advisor Job Description – Asia Pacific Region**

### **Role Objective:**

- Help drive the Knowledge Capture and Reuse processes within Asia Pacific (AP) by assisting Bid Managers, Project Managers (PMs), Solution Architects (SAs), and Consultants in accessing and using Engagement Knowledge Management processes systems and tools.
- Provide advice and KM consulting to project teams and individuals to increase reuse and repeatability across the region.
- Network with Subject-Matter Experts (SMEs) and other AP and Worldwide KM resources to identify and deliver required knowledge, expertise or collateral to K-Advisor callers requesting assistance.

### **Key Accountabilities:**

- Act as a broker to connect people to the appropriate SMEs
- Where appropriate provide expert advice based on personal subject matter expertise
- Assist users in searching for selling and delivery reusable collateral.
- Assists users that are wishing to contribute new or improved collateral for possible reuse
- Help users get up to speed on the Project Profile Repository, SharePoint, Forums, Knowledge Briefs, and other KM tools
- Facilitate collaboration needs
- Direct users to the right knowledge sources based on their specific needs
- Actively advice and guide project teams especially at bid development or project startup to ensure their collaboration workspace are established effectively and efficiently as well as to encourage the teams to search for Project profiles of similar projects to leverage and share.
- Solicit user feedback
- Conduct training on KM process, systems and tools
- Participate in other user support initiatives
- Provide Monthly AP K-Advisor report with key metrics, issues/problems with KM process, systems and tool, and recommendations

### **Skills:**

- Good people and communications skills
- Able to quickly learn about tools and processes
- Eager to be of help to users
- Subject matter expert in a solution set or discipline, e.g., PM, SA, Test Manager
- Demonstrated understanding of C&I business initially, later expanding to the other business units
- Excellent planning and organisation skills, tracking and monitoring a range of activities at any one time
- Good analytical & decision-making skills
- Flexible and adaptable
- Intellectually curious, actively keeps abreast of knowledge developments

- Uses own initiative, demonstrates a creative approach to problem solving
- Strong analytical skills
- Drive and resilience to achieve challenging objectives
- Calm and collected, even when under pressure maintaining a high level of performance

**Experience:**

- 3-5 years team leader/project manager/solution architect experience
- 2-3 years business pursuit/customer engagement experience

**Reporting:**

- Reports to HP Services KM Lead