

## **Creating a People-centric Organisation – The Role of Training**

Speakers are:

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*Hello and thank you for allowing me to join you virtually. There is nothing more central to our progress than the topics you plan to address at the WOLCE event. It is only possible for me to be able to attend this way - 2 years ago we did not have the technology nor the enthusiasm to communicate virtually as such. Today it is a central way of working at Ogilvy and Ogilvyone has piloted what I am now using across our entire Ogilvy organisation. Perhaps it will spark some ideas for you in your roles.*

*I would also like to thank Angus for taking the majority of the presentation work off our hands, thereby allowing me to help some New Yorkers keep on path.*

### **Agenda and Aims**

1. Sharing the Ogilvyone experience
2. Creating the right culture for success
3. Linking personal and business objectives
4. Managing the development and training.

This session will be describing the experience of developing one of the most comprehensive bodies of proprietary knowledge in our industry, marketing and communication services, as well as its distribution through the knowledge management system, and how that is maintained to support the organisation and people in their development and training.

### **Truffles**

The aim of truffles is to support training of people and ongoing management of their work.

*Our CFO estimates that we have thousands of people working more productively (and he is one demanding fellow)- we get news to them faster, knowledge to them in usable portions and help to them upon demand. And it happens quickly.*

*For example, we added a new feature to the site on September 13<sup>th</sup>. It is called Ogilvy Family Notes. Directly from our top management it distributed and chronicled the news we needed to get around. In photos, memos and video we were able to share the impact of the recent tragedy in a way that our employees found comforting.*

Everyday learning accumulates too. One of the things we can definitely say about Ogilvyone is that the kind of work it does for its clients today on the whole is significantly different from what it was doing a few years ago. Some of this is down to changes in the environment, such as the whole development of the internet, but a lot more is also to do with improved thinking and practice in marketing and communications consultancy. For example: *today we manage the websites and marketing for 2 of the Top 5 Consulting businesses in the world and another 2 on local bases.* Ogilvyone is also implementing radically more sophisticated international and national relationship marketing services for global brands like IBM. Whilst you cannot give all the credit for that for what Truffles has achieved, there is no doubt that Truffles has shifted peoples practices and contributed to our climate of new thinking, learning and practice that has kept Ogilvyone at the forefront in a changing world.

## **Ogilvyone Worldwide**

Perhaps a small amount of data will help you visualize the challenge we had. Ogilvyone was

- Founded in 1972 by David Ogilvy
- US 2.8 billion dollars in billings
- 116 offices in 55 Countries in 70 Cities
- 4,500 employees including 1,500 interactive specialists
- 12 clients served in 5 or more markets, the number one in the world
- Ranked number 1 in many markets, almost everywhere amongst the top 3.

Ogilvyone is the worlds strongest, most experienced, one to one network. It supports a wide range of clients, from global organisations such as IBM and American Express to national organisations and pro bono serviced charities. It provides these companies with a range of services in the field of communications consulting and the building of infrastructure to support one to one connections between the brand and the customer.

## **Customer Ownership**

Customer Ownership is the brand name of the Ogilvyone proprietary knowledge and practice system that has been developed over the course of ten years. It was designed to support Ogilvyone in enabling people to work smarter.

Customer Ownership began with the process of asking what clients would need and was based on a long-term strategic view, that we will come back to. Today there are 2,305

knowledge objects on Truffles. These vary from documents that have had over 10,000 accesses to those only accessed once.

Customer Ownership was/and is continually developed using knowledge teams of senior people from around the world. Most of these teams brought people from several offices together at once as a task force to develop best practice knowledge. Sometimes drawing on proven experience from around the world, others searching and developing new tools and techniques on behalf of the network. This process was based on the following principles:

- Trying to involve people from different offices so there would be buy-in from those offices later.
- Ensuring that there was involvement and participation by some of the best minds in the network.
- Getting a spirit of ownership in everything that happened.
- Training does not just happen from a centre but also can happen by people training each other across the organisation network.

The role of Stepping Stones, in particular myself, was to facilitate these initial task forces as well as the overall project and on a number of occasions to make significant contributions in terms of thinking and work towards developing the finished products.

## **12 Principles to Share**

Interaction is always better one to one  
VIPs must sustain responsibility  
" Grass Tops" alone never make it  
Practicality matters  
Be like oysters  
Every system needs planning and overhauls  
Discovery online is individual  
Measure success  
Visuals are a universal language  
Workflow is the game of entry, learning path raises the bar  
Language cements community  
Fun matters

These are the main principles we have been learning over the last eight years that we have been implementing knowledge management systems. I shall go through them in more detail.

# 1. Interaction is Always Better One to One

## ***Face to face is important***

Ogilvyone is a one to one business. This means they help their clients to develop one to one relationships with their customers. They have applied the same principle in the internal way that they operate and in the knowledge management system. Clearly if you can get people to meet face to face there is always a wider range of learning opportunities available. So the inclusion of e-learning does not exclude the need for face to face meetings. As you can imagine with 116 offices around the world it is not always possible to bring together the people that are needed and it is not always easy to share knowledge. That is one of the great advantages of e-learning.

## ***Personalise***

We still need to make sure that what people experience is something that they can **make personal** for themselves. For that reason Truffles, the Ogilvyone knowledge management system, is personalised so that each person can set up their own profile and indicate what their interests are, what communities of interest they want to belong to, and they can store favourites that they would like to look at. They can use this to help them find their way through Truffles and to dialogue with each other in communities of interest around their own initiated topic questions. This is indeed one of the great advantages of an e-learning system.

## ***Create relevance***

As a trainer it also means that when documents are loaded on Truffles we can automatically generate personalised communication that tells them that something is on Truffles that they would like to look at. I think this has to be one of the challenges of the e-learning developer: how can you ensure that the design of the system enables learning to be as personalised as possible for its user? Another part of the system is obviously the ability to search through the database and retrieve things that are of interest.

## ***Meet all needs***

What this means is that while we support the practice of on and off-line training sessions, we see e-training as a support for self-directed learning. Since the name Truffles derives from David Ogilvy's famous saying, "We pursue knowledge the way a pig pursues truffles", how else could we view it? Truffles is an holistic training concept. Remember, e-training is a way of supporting what used to be called on-the job training as well as formal courses.

We believe in formal course and informal packaging. For that reason we have sponsored the IDM and -as Professor

Derek Holder of the IDM who is in the audience will no doubt testify - we have broken new ground with them on delivering important content to a larger group of geographically dispersed folks than they would have normally served. Right , Derek?

## **2. Vips Cannot Escape Responsibility**

### ***Take it from the top***

One of the reasons why Truffles has been so successful is because it has had the commitment of the Chairman for over ten years now. When Reimer Thedens, the Chairman of Ogilvyone, kicked off the process of search and development in 1991, he also kicked off his process of commitment to achieving success. This has meant that he has continued to put resources into the project and maintained faith, even when things went less fast than we would have liked and through considerable change, for example the whole development of the web and internet and the new economy issues.

At the same time I can also say that it has had the extraordinary commitment of Patty Lyon, originally the Global HR and Training Director and now Knowledge Director. It is all very well for the Chairman to back it, but it also needs hands on executive authority from a senior place to keep the project moving.

### ***Stay the Course on Strategy: Adoption is geometric***

If you keep changing your strategy, people get confused. If you continue with your strategy - supporting the knowledge management system - others will come to believe that it is worthwhile. We certainly had times when progress was not as fast as we would have liked.

Organisations that invest in a knowledge management system tend to make a majority of their investment in the system at the beginning of the project. This means there is a temptation to want instant mass take-up of the system and instant returns on the investment. However, our experience shows that it takes a relatively long time for the system to become accepted and widely used, because it involves changes in learning and behaviour patterns. It also takes time for the cynicism to be overcome as well as time for the system to really develop a quality of what is available. For these reasons response is not always instant but what we have found is that once take-up begins it gathers pace throughout the organisation.

### ***One breakthrough can pay for it***

At the same time, what we found is that individuals have sometimes had massive breakthroughs and terrific help. We have documented cases where as a result of information people found there is a significant likelihood that they won major pieces of business they might not otherwise have won. Just one of those occurrences could pay for the whole investment.

*In Guatemala we won a large banking client because the Office head could demonstrate how quickly information was shared and retrieved-and not necessarily just by industry. In Brazil, we won a major media account after the Office Head spoke at a conference about the power of Truffles. In Germany we recently recruited a senior player, and he attributed the defining acceptance moment on the access he would have to the rest of the network at his fingertips.*

### ***Leaders need to lead***

Over and above that, it has been really important to get support from the Heads of Office. Not everybody has given an equal level of support and one of the things that has been necessary is to really encourage them to support it within their office. When leaders adopt practices with vision and enthusiasm, then other people follow them. Ogilvyone has a transnational board, its members come from most of the continents of the world and they have also been instrumental in backing it and showing leadership through their contributions in the offices they manage.

*For example, Mike Windsor, the President of Ogilvyinteractive worldwide is one of the advocates. Along with creating a special community for interactive developers, he has used our site to communicate with staff. And he also has been a prolific contributor of content. That was especially important because as Head of our e-business his demonstration of belief really counted as a model.*

## **3. “Grass Tops” Alone Never Make It – it needs Grass Roots**

### ***The value of the heavy user!***

The grass roots are of course the heavy user, the people who plunge into the system and draw what is available out of it creating the energy for growth. The Pareto principle operates as much in a knowledge management system as anywhere else. There are heavy users who make extensive use, frequently hours each week, while other people make less frequent use, often accessing only now and again. Partly this is perhaps down to knowledge of what is available, personality and other factors.

Our experience is that you need to identify those who are the heavy users of the system who will make it work, encourage them and they will encourage others to use the system and so the system and its usefulness will grow. For example, they not only ask questions in the discussion zones and but regularly contribute answers and suggestions to what others bring. Obviously we do this by measuring how much people use it and then responding accordingly.

### ***Show recognition***

One of the most important contributions Patty makes, and her team around her, is in recognising people and showing appreciation. Often it just needs the social gesture of recognition. But, there may also be career opportunities and it does no harm for people to see that contributions are appreciated. For example, some of them get adopted as local office knowledge managers. Our newest KM in Amsterdam is a senior creative who volunteered for the extra work!

### ***Think global, act local***

In each office somebody SENIOR is appointed to be responsible for the system, for encouraging local use, collecting information about likes and dislikes and liaising with the central team in terms of determining the future of the system and encouraging usage:

- E.g, the knowledge manager in Madrid, Spain organised a contest that generated a lot of interest in Truffles and introduced a new generation of users to what was there. It was fun and linked documents and people from around the world.
- Then the idea was picked up in Toronto, Canada. The execution was a little different but the rewards were similar-ranging from gourmet nights out to desktop piggy reminders.

It is absolutely essential to make a human connection between the central (or global) team and local users and knowledge managers. One of the ways this is also supported is by having regular web conferences with local knowledge managers as well as meetings with knowledge managers from the major offices, usually twice a year. Our current KM team leader is a Belgian with multi-continent experience. We seek out experts to lead that have ambitions and talent to be truly global.

Engaging advocates **and** cynics enables you to encourage converts and confront criticism. When you engage cynics in a positive way, they can become advocates and they can also give you many good ideas about things you need to take care of or watch out for as well as things to

provide that will enthuse people. At the same time, engaging advocates as we have already said is a way of promoting wide-spread usage.

#### **4. Practicality Matters – training in everything important related to the job**

Including simple but useful pieces of information in the knowledge management system, trying to make it as accessible as possible encourages people to visit the site regularly and collect the information they need when they need it. In the process it can also encourage them to investigate other areas of the site. This is the same principle that retailers use.

One of the ways that we do this is that Truffles integrates everything together that Ogilvyone users need. It is not just a separate knowledge management system, related to proprietary techniques and so on, it is the majority of knowledge that people need. It covers all aspects of training from induction into the company, HR practices, names and addresses of people around the globe and so on.

When you register yourself onto the system and give information about yourself, often a combination of fun and chatty stuff with detailed technical knowledge, this is then used to support searches for people with relevant expertise. For example you can find people who work with particular clients around the world. Or you could find out information about people who have specific kinds of expertise. This immediately translates into better work for our clients and a tighter network of people.

Also included are various tools that people can use, for example key templates and spread sheets and also credentials presentation, standard decks for various uses and public information such as press releases.

Altogether Truffles includes all kinds of information such as:

- Cases
- Theory
- Tools
- Discussion Papers and Think Pieces
- Discussion areas where people can exchange views
- Electronic copies of articles from major journals such as the Harvard Business Review and the Interactive Journal
- Speeches
- Sales presentations made to clients
- Examples of work

- And most importantly the best of creative material that has been done with clients around the world.

*In terms of induction, we have developed an interactive online tutorial that every employee is prompted to 'take' in their first 3 months with Ogilvy. We call it Ogilvyone Essentials. As a tutorial it covers the key learning but also enables self-paced learning; in the New York and London offices we combine this with an assigned learning mentor to ensure that people actually turn the course into actionable work everyday. And yes we do reward 2 tiers: completion and excellence!*

*For example, if as a newcomer you also work on American Express you are required to review a select set of background documents before you may speak with a client anywhere in the world!*

## **5. Be Like Oysters**

Surround yourself with people who make you into a gem. Nobody knows everything and you need to have people around you who can contribute from their expertise in the past and stimulate you in your ongoing journey. For example Ogilvyone worked with Stepping Stones and without their help would probably not have got where we are. We also involved Arthur Anderson in a significant way to help with one step in the process. Plus Ogilvyone has kept in touch with major players like Forrester and others doing research and keeping track of their ideas as well as attending conferences, as you are on this occasion.

Partnering should always leads to better results. In fact for several years Stepping Stones actually operated as the Ogilvyone knowledge managers. This meant that during a phase when the Ogilvyoners wanted to be focused on researching and developing and other activities, Stepping Stones was responsible for the practical management of the system and the loading of all new material that came into the centre.

*Patty: " I suggest we learned from each other. Stepping Stones advanced our ability to deliver what we wished for. And we tried to keep raising the bar to encourage Stepping Stones to bring best in class work to Ogilvy. A small example is our Knowledge Managers Guide (the manual is only a small manifestation of what the Guide includes)-Angus and his team were able to create the framework process before we had the skills to do it. Literally today we have just issued version 7, and it was created in house.*

*On a larger front, the oyster theme also means that you accept that someone external is not going to be providing*

*status quo - they should be requiring you to strive further - only then are the pearls made."*

## **6. Every System Needs Regular Overhauls and Good Planning**

The Ogilvyone knowledge management system now has a series of knowledge managers, as I said, one per office, who are responsible for updating the site regularly. We plan a major new release of the system in 2002 as a result of feedback we have been getting over the last couple of years. This is now the third release level we have reached. Our fourth is actually a commercially available product - *The Knowledge Refinery*. We have had the good fortune to have a service our clients do find is state of the art! (Do ask Patty more about it!)

At the same time what we try to do is put in a version and then stabilise while we get feed back instead of constantly tinkering. That way we put something in, gather feedback about it and then we improve it.

Implementing improvements and enhancements also takes a lot of planning and communication. Take what was involved in the launch of Essentials...

### ***Essentials launch visual***

## **7. Discovery Online is Individual and unpredictable**

Everybody learns by themselves. Even when you are in a group of people - the learning needs to take place inside your own head connecting to the system of concepts and associations you already have. It is no different online. What we do is try to enable people to follow their own interests as far as possible. On the one side we provide learning parts that encourage people to go through a series of documents to learn things, on the other we provide general search facilities and so on that enable people just to follow up on their interests. Also, virtually every document is cross-referenced to other documents where there is more information on the same theme. So, as with a good encyclopaedia with cross-references you can keep following your interest for hour after hour should you have the time and inclination.

Moments of Discovery are different for everybody. There fore knowledge breakthroughs are a bit like the chaos theory - somewhat unpredictable. Breakthroughs do not happen everyday - even when that learning is disseminated by e-learning - but an efficient and effective knowledge management system is constructed in such a way that it facilitates these breakthroughs and helps distribute the insights quickly.

## **8. Impressions count**

### ***First visit***

The big turn-off/turn-on moment is the first visit. Will it deliver value or will it simply confuse? We have designed online communications and help to make this simple. Everyone is welcomed with a small and easy guide-  
interstitial. It walks them through registration and help. We then have devised ways to encourage compliance-through a series of fun filled reminders.

And in the major offices we provide a surprise - a once in a while thank you visit from an Office Head.

### ***Visuals are a Universal Language***

In a multilingual environment like Ogilvyone, interesting pictures and good page design enhance the chance of people visiting and using the system. One of the great advantages of Truffles has been the opportunity to distribute a set of standard models and other graphics that people can use around the world so that clients experience consistent and high quality communications and so do the Ogilvyone people.

### ***Design and QA***

One of the things that we would certainly recommend is that you pay a lot of attention to the way things look, not only the overall design of the website but the appearance of every document that goes in. The way we do things is that documents can be loaded from any office. But in order for them to go global they have to be approved by one of a number of global knowledge managers. Their job is on the one hand to ensure quality and on the other to take note of good things and make sure they are leveraged and brought to the attention of people who want to know about that particular subject.

### ***Listen***

We also allow people to vote. Is the document helpful? The simple mechanism is fast and sends the message that we do want the user's input - as well as insights.

## **9. Measure success**

Success needs measurement to make the business case for the future. Things that are not working also need to be discovered and measured so they can be fixed. In Truffles we use many of our own client servicing techniques like Evaluate to help us.

*Evaluate required us to assemble a cross-functional and cross continental team that was charged with defining the crucial success points for 2003. From 181 Key Performance Indicators we have been able to identify the driving and relevant metrics. After*

*honing to 18 that we do track, there are 3 measures that our management regularly watch.*

## **10. Workflow is the Game of Entry: Learning Path Raises the Bar**

Which brings me to the point that Truffles as a training path aims to contribute at least two levels:

- It aims to provide tools and techniques that enable people to do what they are doing more efficiently.
- It enables people to think more effectively and therefore operate more effectively in what they do.

This goes back to the famous distinction that Peter Drucker made between efficiency and effectiveness: obviously both are needed and Truffles support both. Let me give you an example of what that means. The availability of templates, credentials presentations and other presentations by other Ogilvyoners around the world means that when it comes to doing a new pitch for a client you might well be able to develop a lot of the material a lot more quickly and to a high standard. Now over 60% of the time can be spent in solving a problem rather than reinventing a template. Even more important the way you think about the problems they have and the kinds of solutions you engage with can be an order of magnitude more sophisticated and strategic. People will use the system once they realise that it can *help them* with their daily work. They will be really enthused about the system when they realise it can *transform* their daily work.

## **11. Language Cements Community**

Just as speaking a common language, such as English, can enable people to communicate more effectively so a knowledge management system can help users to speak the language or organisation jargon more effectively giving them an advantage in terms of organisation and efficiency. Cultural studies show that one of the hallmarks of any successful culture is that it has its own distinctive language as one of its memes. Shared language in this case relates to shared ideas, such as proprietary models and ways of doing business, these in turn create a spirit of community. Obviously you have to be careful to make sure when you are talking to the outside world that you do not speak in incomprehensible jargon. At the same time it does mean that where you have developed proprietary concepts with their own terms everybody around the world uses the same language. There is no doubt that Truffles has significantly contributed to major new tools in a way of thinking that is now shared by very large numbers of Ogilvyoners around the world.

## 12. Fun Matters

People look to work as a place where they can find joy and fun (not exactly the same thing). Joy probably comes from learning, discovery, breakthroughs and business success - things we have discussed. But it is also important to create fun. So we create interesting areas of the web site to encourage users to visit and to come again and surround the Truffles system with various activities that add to fun. All the different Christmas cards that Ogilvyone offices use, many of which were quite amusing, light hearted and creative.

As another example, when Truffles was launched in the various offices we had parties and other festivities associated with them. From Singapore to Stockholm to Sao Paulo Knowledge managers were responsible for organising these and it was an opportunity for people to get together, have a few drinks and so on. I think that the Truffles logo, our pig, rather exemplifies the principle. We have encourage people to be be piggie, to feed the pig and provide it succour-perhaps this is more feasible in a very creative environment. However we have evidence to suggest that these little touches add up to memories and experiences that do matter.

## Conclusion

At the end of the day, new learning still amounts to a sharing of knowledge between people. The knowledge system is only a means of assisting that to happen. One bright person creates something somewhere in the world and it can then be distributed to thousands of other bright people around the world.

Clearly individuals have to take responsibility for their own learning and knowledge. Ogilvyone backs that up in various ways, for example it requires people to spend a certain amount of time reading Truffles and it allows people to record time on Truffles on their time sheets as a valid activity. People have to take their own initiative and responsibility as well. I can report that recently when one fairly senior person said that they did not have time to spend looking at Truffles the response they got from the relevant board director was, " I am so sorry to hear that you are a person who is not interested in your own learning and self development" .

A story like this shows that you have to stand for what you believe in, but at the same time it is important to recognise that learning responds to enthusiasm of the individual. That enthusiasm needs infrastructural support. From our start with 3 part-time people, two outside the company, and a Lotus Notes system to now a global web based system (with a wireless component)

supported at the centre by only 5 full timers in a variety of roles (IT, Design Content.), Ogilvy have managed to change the behaviour of the people and the work they deliver.

" A very few dedicated people can make a very big difference" .

Thank you.

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