Benchmarking Knowledge Management Technologies and Behaviours

Asia-Pacific
Economic Cooperation

APEC Working Group on Trade Promotion
TP 01/2005T
April 2006

Prepared by

New Zealand
TRADE & ENTERPRISE

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Debbie Lange and Paul Vaughan

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INTRODUCTION

This project was approved by the APEC Working Group on Trade Promotion (WGTP) meeting in Auckland, New Zealand in 2004. It is intended to provide up to date information on knowledge and information sharing strategies and technologies ('Knowledge Management') in APEC member economy Trade Promotion Organisations (TPOs).

This project involved a questionnaire survey and follow-up interviews with a range of APEC TPOs in 2004/05. The survey information has been used to develop best practice case studies and simple tools for assisting the development of ongoing Knowledge Management strategies. It is envisaged that a second phase of the project, involving the creation of a collaborative Knowledge Management portal, will be developed at the conclusion of the project.

Discussions among WGTP members revealed that many APEC TPOs are heavily constrained by ineffective data management and information transfer systems. Key objectives of this project have therefore been to:

- Investigate current Knowledge Management processes within APEC member economy TPOs, in order to increase understanding of how knowledge and information are currently being used and shared, and how Knowledge Management best practice can assist in building organisational capability.
- Develop and publish APEC best practice case studies, and some simple Knowledge Management strategy tools that APEC member economies can use in setting up knowledge strategies appropriate to their needs. These can be used by member TPOs for their own needs, and for increasing the capacity of industry networks and individual enterprises.

In addition, this project aims to increase the understanding of the contribution that appropriate Knowledge Management processes play in the development and implementation of soundly based national growth strategies within member economies. It is directly related to two of the four ECOTECH priorities endorsed at the 15th APEC meeting, namely:

- Integration into the Global Economy
- Development of Knowledge-Based Economies.

TPOs are effectively knowledge and information rich organisations that interact with a wide range of companies, governments and sector bodies both at home and in offshore markets. National trade development depends on how well individual TPOs share this information with their domestic companies. The role of TPOs is typically to provide context to information gathered in the process of engagement and to create through this process competitive intelligence that can be used for business strategy and export development. Best practice Knowledge Management strategies are implicit in all these processes, and are critical for their success. Improved Knowledge Management strategies will enable TPOs to provide better information on global opportunities to companies in individual member economies. Better information will ensure additional confidence in policy development and capacity building at TPO and company level.

Lastly, this project aims to deepen our understanding of knowledge transfer processes across the APEC region. Lack of information or misinformation about real

trade opportunities created through trade liberalisation often acts as a barrier to further trade liberalisation. It is therefore crucial that APEC member economy TPOs play an active part in disseminating information and building awareness amongst member economies about the resulting trade opportunities.

TPOs face common Knowledge Management challenges - the need to connect with a wide network of small but very important offices overseas; the need to seek information from, and provide information to, multiple sectors and companies in their own economy; the need to store and retrieve information quickly; the need to assess, distribute and publish research information; the need to create 'virtual communities' and help them work harmoniously together; and in some cases the need to comply with government requirements relating to the archiving of information.

TPOs are also under pressure to be innovative in the area of support to businesses and Knowledge Management is an area in which TPOs can make rapid gains in organisational efficiency, and in supplying services to companies. Best practice guides and toolkits are a simple means of making Knowledge Management strategies readily understood and enabling better uptake of these strategies.

This study will directly benefit APEC TPOs through the improvements in Knowledge Management strategies that they will implement as a result of the study. In addition, case studies focus specifically on how to ensure the delivery of targeted information to companies, and on the creation of collaborative networks as 'communities of interest'.

This study consists of two major parts: the results of the questionnaire survey and a collection of Knowledge Management best practice case studies.

The first part, sections 2 and 3, describes the questionnaire approach. These sections identify the current situation in regard to Knowledge Management understanding in member economy TPOs, and ascertain whether they currently have Knowledge Management strategies in place.

The second part, sections 4, 5, and 6, establishes a database of Knowledge Management best practice case studies. This information is intended to provide a simple toolkit that can be used by member economies in benchmarking their Knowledge Management strategies and in developing new strategies.

METHODOLOGY

The project consists of two parts. Part One is a questionnaire of TPOs in APEC economies, which will identify current Knowledge Management strategies and practices. Part Two consists of follow up case study interviews of selected participants of the questionnaire. Analysis and case studies can be used by member economies in benchmarking their Knowledge Management strategies and in developing new strategies.

PARTICIPANTS

Participants include all TPOs from 21 APEC economies as follows:

Australia	Australian Trade Commission (Austrade)
Brunei Darussalam	APEC Desk Brunei Darussalam - International Relations and Trade Development
Canada	Department of Foreign Affairs and International Trade
Chile	Prochile
People's Republic of China	China Council for the Promotion of International Trade (CCPIT)
Hong Kong, China	Hong Kong Trade Development Council (HKTDC)
Indonesia	National Agency for Export Development (NAFED)
Japan	Ministry of Economy Trade and Industry (METI)
Republic of Korea	Korea Trade Investment Promotion Agency (KOTRA)
Malaysia	Malaysia External Trade Statistics (MITI)
Mexico	Mexican Bank for Foreign Trade (Bancomext)
New Zealand	New Zealand Trade and Enterprise (NZTE)
Papua New Guinea	Papua New Guinea Chamber of Commerce & Industry
Peru	Peru's Export Promotion Commission (PROMPEX)
Philippines	Department of Trade and Industry, Bureau of Export Trade Promotion
Russia	Ministry of Economic Development and Trade, the Russian Federation
Singapore	International Enterprise Singapore (IE Singapore)
Chinese Taipei	Taiwan External Trade Development Council (TAITRA)
Thailand	The Department of Export Promotion, Ministry of Commerce
United States	US Department of Commerce
Vietnam	Vietnam Trade Promotion Agency

A list of initial contacts within each of these organisations was supplied by the APEC TPWG. From this list, organisations were asked to nominate the most appropriate person within their organisation to complete the questionnaire, for example a Knowledge Manager, IT Manager, Librarian, Research Manager or someone who works with Information Management, and speaks English.

PART ONE

Part One is a questionnaire of TPOs in APEC economies, which provides an initial overview of Knowledge Management strategies and practices.

The questionnaire was developed in conjunction with economies that sponsored this project and was forwarded to TPOs for completion in late November 2004, with a request for a full response by 31 January 2005.

The questionnaire was developed online. Participants were given the option of responding using the online facility or by completing a Microsoft Word document and returning their response by email.

The questionnaire focused on the following areas:

- Knowledge Management strategies and initiatives
- Knowledge Management technologies such as Document and Client Management Systems, Records Management, Intranets, and web sites
- Knowledge and information sharing behaviours

Response Rate
From a total of 21 APEC economies, 20 responded to the questionnaire, a response rate of 95.2 percent.

Participants included:

Australia	Australian Trade Commission (Austrade)
Brunei Darussalam	APEC Desk Brunei Darussalam - International Relations and Trade Development
Canada	Department of Foreign Affairs and International Trade
Chile	Prochile
People's Republic of China	China Council for the Promotion of International Trade (CCPIT)
Hong Kong, China	Hong Kong Trade Development Council (HKTDC)
Indonesia	National Agency for Export Development (NAFED)
Japan	Ministry of Economy Trade and Industry (METI)
Republic of Korea	Korea Trade Investment Promotion Agency (KOTRA)
Mexico	Mexican Bank for Foreign Trade (Bancomext)
New Zealand	New Zealand Trade and Enterprise (NZTE)
Papua New Guinea	Papua New Guinea Chamber of Commerce & Industry
Peru	Peru's Export Promotion Commission (PROMPEX)
Philippines	Department of Trade and Industry, Bureau of Export Trade Promotion
Russia	Ministry of Economic Development and Trade, the Russian Federation
Singapore	International Enterprise Singapore (IE Singapore)

Chinese Taipei	Taiwan External Trade Development Council (TAITRA)
Thailand	The Department of Export Promotion, Ministry of Commerce
United States	US Department of Commerce
Vietnam	Vietnam Trade Promotion Agency

PART TWO

Following receipt of the questionnaire and an initial analysis, 11 participants were selected to be the focus of case studies. A programme of visits to selected TPOs was then initiated.

Eleven participants were selected to reflect a range of maturation in Knowledge Management strategies and practices.

The following participants were selected for case study visits:

Canada	Department of Foreign Affairs and International Trade
Chile	Prochile
People's Republic of China	China Council for the Promotion of International Trade (CCPIT)
Hong Kong, China	Hong Kong Trade Development Council (HKTDC)
Japan	Ministry of Economy Trade and Industry (METI)
Republic of Korea	Korea Trade Investment Promotion Agency (KOTRA)
Mexico	Mexican Bank for Foreign Trade (Bancomext)
New Zealand	New Zealand Trade and Enterprise (NZTE)
Peru	Peru's Export Promotion Commission (PROMPEX)
Thailand	The Department of Export Promotion, Ministry of Commerce
United States	US Department of Commerce

Case study visits were conducted in March 2005.

DISSEMINATION OF PROJECT OUTPUT

Project findings are published as a report and distributed free of charge to participating economies, mainly electronically on pdf files, but Word files and hard copies will also be available. Five hard copies will be produced for the APEC secretariat and two hard copies will be produced for each member economy. Publicity will be in the hands of member TPOs.

SURVEY RESULTS

Australia

1. Organisational Overview

Please state the name of your organisation.
Australian Trade Commission (Austrade)

What is your organisation's mission?
Austrade contributes to community wealth by helping more Australians succeed in export and international business

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
At the Federal level, none has trade promotion as its core activity. Some individual States do their own promotion.

How many staff do you have located onshore or within your country?
495

How many staff do you have located offshore or overseas?
513

How many staff do you have in total?
1008

How many offices do you have located onshore or within your country?
16

How many offices do you have located offshore or overseas?
101

How many offices do you have in total?
117

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
Government funding (A$158m); provision of services ($24m); other ($6m)

What is the total operating budget of your organisation? (*Please state amount in your local currency.)*
A$188m

What are your organisation's key performance indicators?
Community awareness of the importance of the Government's trade and international business facilitation activities through Austrade

- Proportion of Australians who believe exports make a major contribution to the economy [1]
- Client satisfaction with Austrade's services

- Client satisfaction with Austrade's New Exporter Development Program
- Number of Australian exporters [1]
- Number of clients who achieve export success with Austrade's assistance
- Value of export success with Austrade's assistance ($m)
- Number of new exporters [2] and other clients in NEDP who achieve export success with Austrade's assistance
- Number of existing exporters who achieve export success with Austrade's assistance
- Number of clients who achieve outward investment success with Austrade's assistance
- Value of outward investment success with Austrade's assistance ($m)||Number of clients in Biotechnology, ICT and Services sectors who achieve success with Austrade's assistance [3]

Footnotes:
[1] Not wholly within Austrade's control
[2] First export sale of $5,000 or more in the last three years
[3] Success is defined in terms of export, investment and non-monetary measures such as strategic alliances and joint ventures

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
Similar to above

Do you think Knowledge Management is more about organisational culture, technology, people or content?
A balance of each of these.

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
To support the attainment of corporate objectives. KM should enhance the organisation's performance through more effective use of knowledge and information.

What are your organisation's current Knowledge Management issues?
1. Implementation of strategy
2. "KM" has negative connotations - therefore finding a way to implement program with greater enthusiasm and buy-in from staff

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your current Information Technology strategy or programme? *(Please give details)*

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
Because Austrade provides advice to clients, which is based on sound knowledge and information. Therefore KM (management of both knowledge and information) is core to our success.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Senior Management
Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Not widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
0.1%. Increase, hopefully!

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
The "group" in above question consists of one person at present. (Actually none, because I have now quit!)

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*
N/A

What Document Management System product/software do you use?
N/A

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)

N/A

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
N/A

Is your Document Management System accessible from both onshore and offshore?
N/A

Is it mandatory for staff to save documents into the Document Management System?
N/A

Is saving documents into the Document Management System a manual or automatic process?
N/A

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
>5 years ago

What Client Management System product/software do you use?
Developed in-house
Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Group Manager- KM. Recently passed to Group Manager - IT Business Services. Not sure if this will be permanent.

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
A (very part-time) regional trainer in each region.

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual AND Automatic/System Generated

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Manager, eCommerce

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Not required.

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
1. News, both corporate and external, via news feeds
2. HR stuff - emplyment opps, etc
3. For learning and development (a large part of the intranet, called the 'Austrade Institute', is devoted to this.
4. Referencing management and admin policies
5. Accessing e-forms

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.austrade.gov.au

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Manager, eCommerce

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Not required for using. Training is provided in use of content management system, which by CD-ROM-based training.

Please list the top five things your website is used for in order of highest use to lowest use.
1. Research by exporter
|2. Appplying for grants.
3. Registering for events.
4. Searching our database for Australian suppliers.
5. Recruitment.

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.
http://www.naa.gov.au/recordkeeping/overview/summary.html

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Hybrid model. File system is not standardised throughout organisation. Each division has its own structure, which would be functionally-based, but may contain variations within region.

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
CFIO. Below him, Group Mgr - KM for electronic records, and another Manager for paper records.

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 0
General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are planning to implement

Please describe each collaborative tool and its core function.
N/A

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
Yes
What are the key components of your email policy?
That emails which comprise business records need to be retained.

Are you planning to implement any of the following initiatives within your organisation?

Central repository of research undertaken	Are planning to implement
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)

- ABI/Inform
- EIU
- Euromonitor
- Factiva
- Gartner
- IBIS World
- Profound
- Proquest
- TableBase
- World Trade Atlas etc
-

Does your organisation share information with other Government agencies?
No

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
No

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?
Telephone call centre

Please specify
You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Clear objectives. Content, people, process and technolgy elements aligned and balanced. Initiative is positioned and marketed well.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Expansion of online research facility, staffed by professional researchers. They are very successful at finding useful information quickly, which adds to our ability to service clients, and saves time.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
Development of 'tradecraft' modules (tips on how to do common operational tasks), client toolkit (tips, tools, templates to assist in client service) and skills/experience directory. ||These have nor been successful because they are not used much. Reasons include: not-consumer initiated, perception that they don't add value/are too prescriptive, not sold well, and lack of senior management support.

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
Yes. Reasons include:
1. KM Mgr (and unit) focussed on improving CRM system, and had little time for other work.
2. Failure to implement document management system two years ago, when recommended.
3. Too much strategising, around IT architecture and KM strategy.
4. Cultural barriers to knowledge sharing (everyone already stretched to meet their KPI targets).
5. Lack of visible senior management support.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Mixed. Some keen on sharing and understand benefits. Many sceptical.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
None that only apply to us.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
Yes

I**s the annual turnover of staff in your organisation considered to be low, medium or high?**
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
In relation to "Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?", the answer was "yes". But the real answer is "Yes, supposedly. But only in a few instances does this happen."

7. About the respondent

What is your job title?
Group Manager, Knowledge & Information Management

What are your key responsibilities? *(Please describe)*
too hard to detail here - sorry.

How long have you been in your current position within your organisation?
3-5 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
Senior Trade Commissioner
Leader Innovation Task Force

& others

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Brunei Darussalam

1. Organisational Overview

Please state the name of your organisation.
International Relations and Trade development – Brunei

What is your organisation's mission?
Actively promote, facilitate and accelerate economic diversifications trhough dynamism in trade

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
1.Promotion and Entrepreneurship Development Unit
2.Brunei Darussalam Economic Development Board

How many staff do you have located onshore or within your country?
25

How many staff do you have located offshore or overseas?
2

How many staff do you have in total?
27

How many offices do you have located onshore or within your country?
1

How many offices do you have located offshore or overseas?
2

How many offices do you have in total?
2

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
collection of fee from issued of Certificate of Origin, B$20,000.00 per annum.

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
B$181,000.00 per annum

What are your organisation's key performance indicators?
number of Certificate of Origin issued, Number of Trade Agreements and MOU concluded.

You have reached the end of Section 1. Do you have any other comments about your organisation?
Operating base on Government Budget

2. Defining Knowledge Management

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?
Somewhat important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Monitoring market opportunities, matching the right skills with the right projects
What are your organisation's current Knowledge Management issues?
Lack of capabilities and skills

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
refering back to the first qn, defining knowledge management as management of informations and skills; and 2nd qn is that knowledge management is more about organisation and people.

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No

Do you have any Knowledge Management components within your Information Technology strategy or programme?
Yes

Please give details.
Human Resource Management System (HRMS) and Electronic Documents Management System (EDMS). Both are under the e-government projects. as well as the e-library system

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

Do you have any Knowledge Management components within your current Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
Human Resource Management System (HRMS) and Electronic Documents Management System (EDMS). Both are under the e-government projects. as well as the e-library system

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Are planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago

Who has responsibility for managing the Intranet? (*Please specify business unit and/or position title of the individual(s) responsible.)*
Services Unit of Ministry of Industry and Primary Resources, Assistant Directors of Management and Finance.

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Outsourcing

Is your Intranet accessible from both onshore and offshore?
Onshore only

Please list the top five things your Intranet is used for in order of highest use to lowest use.
e-mails;
attendance system
internet

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.industry.gov.bn/div_d.htm

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Divisions of Management and Finance; Director of Administration and Finance

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Outsourcing

Please list the top five things your website is used for in order of highest use to lowest use.
information on organisational structure;
contact informationl
feed-backs

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Functional base on issues or matters; also on accessibility sich as personal or confidential.

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Filing Clerk, confidential secretary

Have you implemented an Online Library Management System within your organisation?
Are planning to implement
If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 0
General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails? No

What are the key components of your email policy?

Central repository of research undertaken	Are planning to implement
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Are planning to implement
Knowledge map of staff skills and expertise	Are planning to implement
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are planning to implement
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
ministry of foreign affairs, ministry of finance and other agencies on economic cooperation matters

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
No

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies? Website
Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
embassy

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
support from various stakeholders and up to date information

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
No

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Good

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
None

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Assistant Director General, International relations and Trade development, Ministry of Industry and Primary Resources

What are your key responsibilities? *(Please describe.)*
Focus on ASEAN issues, and management of the division.

How long have you been in your current position within your organisation?
>5 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
Special Duties Officer

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Canada

1. Organisational Overview

Please state the name of your organisation.
Foreign Affairs Canada (FAC) International Trade Canada (ITCan)

What is your organisation's mission?
Foreign Affairs Canada (FAC) supports Canadians abroad, works towards a more peaceful and secure world, and promotes our culture and values internationally. International Trade Canada (ITCan) supports the development of trade by providing services to exporters, developing policy, and by attracting investment in the Canadian economy.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
ITCan: (1) Export Development Canada, a financial institution that provides trade-related financial and insurance services to Canadian exporters and investors; (2) the Canadian Commercial Corporation, an export sales agency that works to expand Canada's international trade; (3) the North American Free Trade Agreement (NAFTA) Secretariat (Canadian Section), which helps administer the dispute settlement provisions of NAFTA.

How many staff do you have located onshore or within your country?
FAC: approximately 3,900. ITCan: 1,800

How many staff do you have located offshore or overseas?
FAC:As of March 2004, close to 1,700 Canada-based employees and 4,000 locally engaged employees worked in Canada's missions abroad. ITCan:The new Department's trade commissioners (approximately 500 people) are members of the Foreign Service. There are approximately 1,800 people who work in the Department. They are located at headquarters, 12 International Trade Centres across Canada and in 140 offices abroad. Included in the figure are some 600 locally engaged staff.

How many staff do you have in total?
Approximately 9,600

How many offices do you have located onshore or within your country?
ITCan:12 International Trade Centres across Canada

How many offices do you have located offshore or overseas?
FAC:281 missions (embassies/high commissions, consulates general, consulates, satellite offices, honorary consulates and missions to multilateral organizations like the UN).Broken down by region, Canada has 76 missions in Europe, 54 in Asia-Pacific, 63 in Africa and the Middle East, 54 in Latin America and the Caribbean and 26 in North America.ITCan:140 offices abroad (for the most part, co-located with FAC above)

How many offices do you have in total?

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*

- Respendable Revenues: Total Respendable Revenue - 156. 3 million CAD
- International Youth Exchange (IYE) program: FAC uses revenue from user fees to cover incremental costs incurred to support the program at missions abroad, other than costs of processing visas and work permits.
- Specialized consular services: These services include activities such as legal and notary services (e.g. administering oaths, receiving an affidavit, authenticating signature and seal of a foreign authority).
- Canadian Education Centres: The cost of certain services (e.g. rent and utilities) provided to Canadian Education Centres, which promote Canadian education and training services, is recovered from the Canadian Education Centre Network.
- Telecommunications, training and real property services abroad: FAC is funded for the provision of those services that are mandatory for departments to use when required to support Canada's diplomatic and consular missions abroad and has the authority to charge other departments and agencies for optional services. Rates charged to other government departments are to recover incremental costs only, and rates charged to Crown corporations and non-federal organizations do not exceed the full cost of the service being provided, in accordance with the government's cost recovery policy.
- Passport Fees: The Passport Office operates as a revolving fund, which is non-lapsing authorization by Parliament to make payments out of the Consolidated Revenue Fund.
- Non-Respendable Revenues: Total Non-Respendable Revenues - 290.2 million CAD
- Softwood Lumber permit fees: A standard fee for each permit delivered at the customs brokers' installations and a fee of $14 for each permit issued at the Export and Import Controls Bureau is charged to softwood lumber exporters.
- Consular fees on travel documents: In addition to the fees collected for respending by the Passport Office, a consular fee of $25 is collected on behalf of the former DFAIT and credited to CRF.
- Employee rent shares and transportation: Under the Foreign Service Directives employees pay an accommodation rate based on accommodation costs in Ottawa. In addition, under certain circumstances, primarily at hardship posts, employees are permitted to rent official vehicles for personal use. These payments are credited to the Consolidated Revenue Fund (CRF).
- Sales of properties and other assets: As a special operating agency, the Physical Resources Bureau of the former DFAIT has the authority to sell surplus Crown-owned property. The revenue generated from these sales is credited to the CRF.
- Services provided to the Passport Office: Since the Passport Office sets its fees on the basis of the full cost of its operations, the former DFAIT's overhead cost attributed to passport operations at missions abroad must be accounted for. The value of this overhead (financial and personnel services, information management, physical resources) has been established at $4.4 million, and this amount is deposited to the CRF.

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*

Foreign Affairs Canada's total spending authorities stand at $1.7231 billion (includes transfer payments).International Trade Canada's total spending authorities stand at $180 million

What are your organisation's key performance indicators?
FAC:

- The department identified priorities were to strengthen multilateral organizations such as the UN, enhance key bilateral relations with Canada's G8 partners and other countries such as Mexico, Brazil, China and India and promote human rights, good governance and the rule of law.

ITCan:

- Three priorities identified were: Canada-US relations, WTO, FTAA and bilateral negotiations and capacity building, and policy coherence. These priorities contribute to the accomplishment of larger departmental and government-wide objectives.

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge Management is a continuum of Information Management. Knowledge Management is about facilitating the maximum sharing and leveraging of the knowledge and insights of people in terms of a strategy program or result. It means sharing the tacit/implicit knowledge in the minds of individuals from diverse backgrounds and experiences.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
All

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Facilitate sharing/re-use of information/knowledge

What are your organisation's current Knowledge Management issues?
IM is well defined. KM is still in its infancy and requires a formal strategy, program and plans.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
In terms of IM. There is a need for development in terms of IM/KM continuum.

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme? *Please give details*.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
Increasing volume of electronic information and e-mail. We needed new policies, practices, tools and support to help employees cope with increasing volumes of electronic information crossing their desktops on a day to day basis.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Corporate Group

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Very widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
Our current Knowledge Management annual budget is $6.5 million (CAD). We expect this to remain the same this year.

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
The departmental library is the cornerstone of KM.

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)* >5 years ago

What Document Management System product/software do you use?
Hummingbird (new)

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
Knowledge and Information Management Division

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Automatic/System Generated

Have you implemented a Client Management System within your organisation?Have implemented

When did you first implement a Client Management System?
>5 years ago

What Client Management System product/software do you use?
See attached doc

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Trade Commissioner Service, Corporate Services

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Canadian Foreign Service Institute

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Automatic/System generated
Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Integration, Partnering and Application Services Division

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Integration, Partnering and Application Services Division & Canadian Foreign Service Institute

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.

- Services – online administration, finance, and human resources applications
- Broadcast Messages
- Directory
- Internet Access
- Policies and Procedures

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.international.gc.ca/

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Internet and International Service Delivery Strategy Division

Who has responsibility for training staff on how to use the website?
(Please specify business unit and/or position title of the individual(s) responsible.)
Canadian Foreign Service Institute

Please list the top five things your website is used for in order of highest use to lowest use.

- Information to the public
- Services to the public
- Feedback/consultations with the public
- Promotion/marketing

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.

- Information to the public
- Services to the public
- Feedback/consultations with the public
- Promotion/marketing

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?

Electronic

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
RICS / Hummingbird

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Mixture

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Knowledge and Information Management Division

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
Yes

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. (*Please select all that apply.)*
Staff 1
Clients 1
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
A Community of Practice pilot is running with two departmental groups that will allow both of them to extend their existing communities by enabling them to collaborate within a virtual environment. One community is comprised of departmental staff only, and the other is comprised of departmental staff, other government departments, non-governmental organizations, academics, and business leaders.

Who has responsibility for managing collaborative tools within your organisation? (*Please specify business unit and/or position title of the individual(s) responsible.)*
Knowledge and Information Management Division

Do you have a policy within your organisation around capturing and archiving emails?

Yes

What are the key components of your email policy?
Custodianship; security and access; distinctions between enduring and transitory
Are you planning to implement any of the following initiatives within your organisation?

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)
Factiva, EIU, Stratfor,

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
Industry Canada, Canadian International Development Agency, Citizenship and Immigration

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
CCRM

What is the MAIN contact point within your organisation for exporters and companies? Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
Records are both paper or electronic

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?

Yes

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
InfoBank, Virtual Library, Community of Practice
If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
No

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Improving in terms of sharing and collaborating

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation.
Competitive paradigm for rotational assignments, stove pipes still exist but seem to be dissolving.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Director, Knowledge and Information Management

What are your key responsibilities? *(Please describe.)*
Records management, information management, knowledge management and Library Services

How long have you been in your current position within your organisation?
2-3 years

Have you held any other positions within your organisation?
No

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Chile

1. Organisational Overview

Please state the name of your organisation.
ProChile, Export Promotion Bureau of Chile

What is your organisation's mission?
To promote the non traditional exports of Chile, and the foreign investment in Chile

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
None

How many staff do you have located onshore or within your country?
arround 200

How many staff do you have located offshore or overseas?
arround 120

How many staff do you have in total?
arround 320

How many offices do you have located onshore or within your country?
13

How many offices do you have located offshore or overseas?
54

How many offices do you have in total?
67

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
Public

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
arround US$15 million for activities (non operational budget)

What are your organisation's key performance indicators?
exports increasing for prioriority products||- increasing of nuember of chilean exporters

You have reached the end of Section 1. Do you have any other comments about your organisation?
ProChile is a 100% public organization since is part of the Chilean Ministry of Foreirn Affairs

2. Defining Knowledge Management

How would you define Knowledge Management?
Is the management of data, information, know-how and expertise available in the organization, in order to support efficiently the making decision process and planning in the organization

Do you think Knowledge Management is more about organisational culture, technology, people or content?
all of them, but the people and technology are the most relevant

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
The goal of the TPO is to provide not only information, orientation and logistic support to their clients (exports or local companies), but to provide "knowledge" (understood like a service with a real added value). Therefore, the knowledge management is critical to achieve this.
What are your organisation's current Knowledge Management issues? - To go ahead with the system integration and "conversation" (technically and conceptually)||- Capacitation and trainning||- Priorization of products, markets, services and instrument, and focusing.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
Although we don't use in a explicit way the term in ProChile, our planning procces since about one year ago is including the concept in several aspects

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
Because ProChile is and organisation with 30 years and is neccesary to improve and to adapt the services and support for their clients updated requirements that include an important demand for more valuable,complex and sophisticated services an support.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Board Level

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Not widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
Is difficult to define because the KMS is not formal in the Organisation

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
We are starting now with the formalisation and planning process of our Knowledge Management strategies

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
1-2 years ago

What Client Management System product/software do you use?
in house developped

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Head of Commercial Information Department - Manager of System Developping Department

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual AND Automatic/System Generated

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
1-2 years ago

Who has responsibility for managing the Intranet?*(Please specify business unit and/or position title of the individual(s) responsible.)*
Head of Informatic Department - Manager of System Developping Department

Who has responsibility for training staff on how to use the Intranet?
(Please specify business unit and/or position title of the individual(s) responsible.)
Head of Informatic Department||- Manager of System Developping Department

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
Agenda of activities.
BD use thru intranet
Internal and administrative information
Webmail

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.prochile.cl and www.chileinfo.com

When did you first implement a website?
3-5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Head of commercial information department||- Manager of Web Department

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Please list the top five things your website is used for in order of highest use to lowest use.
Market information
ProChile external network (Commercial offices abroad)
Chilean Export Directory
Links to related websites
Events and news

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
No

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
Yes

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 1
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Are planning to implement
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
CORFO : Statistics, market, logistics
Ministry of Economics :Systems integration
Ministry of Agriculture :Statistics, market, logistics, activities planning
Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
Please visit the website www.chileinfo.com(marketplace buttom) to see the system.

What is the MAIN contact point within your organisation for exporters and companies? Telephone call centre

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
No

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Training - Global integration of systems and information in the organisation
- Priorisation an focusing

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
We need to improve in this point due to we dont't have yet the neccesary disposition and discipline in our staff to share their knowledge and expertise.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
I think are not really cultural barriers but mainly technical, in procedures,internal documentation and training.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
no

7. About the respondent

What is your job title?
Head of Commercial Information Department

What are your key responsibilities? *(Please describe.)*
The planning and management of :
- Sources, process and disemination of commercial information
- System developping and implementation in ProChile
- Websites of ProChile
- Call center service of ProChile
- Enviromental and quality information disemination for exporters

How long have you been in your current position within your organisation?
<1 year

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
1990-1994 : Trade Commissioner of Chile in ProChile Seoul-Korea
1995-1998 : Deputy Director for planning in ProChile Santiago
1998-2001 : Trade Commissioner ProChile Casablanca-Morocco
2002-2004 : Trade Commissioner ProChile Los Angeles-California USA

Since 2004(Sep): Head of Commercial Information Department ProChile Santiago

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

I think this is a key issue for all TPO, and that all TPO's are working (more or less) with KM, therefore I want to express my congratulations for this inniciative.||My suggestion, in order to achieve real progress, is to "coordinate" the different points of view, interpretations and concepts about Knowledge Management among de TPO's.

People's Republic of China

1. Organisational Overview

Please state the name of your organisation.
China Council for the Promotion of International Trade (CCPIT),Concurrently also China Chamber of International Commerce (CCOIC)

What is your organisation's mission?
The aims of the CCPIT are to operate and promote foreign trade, to use foreign investment, to introduce advanced foreign technologies, to conduct activities of Sino-foreign economic and technological cooperation in various forms, to promote the development of economic and trade relations between China and other countries and regions around the world, and to promote the mutual understanding and friendship between China and peoples and economic and trade circles of all nations around the world, in line with law and government policies of the People¡¯s Republic of China.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Ministry of Commerce, to be specific, its agencies as stated below:
Trade Promotion Division within Department of Foreign Trade
Ministry of Commerce
Investment Promotion Agency of Ministry of Commerce

How many staff do you have located onshore or within your country?
202

How many staff do you have located offshore or overseas?
37

How many staff do you have in total?
239

How many offices do you have located onshore or within your country?
67

How many offices do you have located offshore or overseas?
16

How many offices do you have in total?
83

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
Government budget

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
Not applicable

What are your organisation's key performance indicators?
Not applicable

You have reached the end of Section 1. Do you have any other comments about your organisation?
No

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge management is what a person or an organization does with his or its knowledge. It exists all the time irrespective of its awareness by its managers. What is of concern here is human intellectual curiosity of how to be a better and more efficient manager of knowledge than previously done especially in the light of latest technology development. Such deliberate efforts as to improve KM are what is discussed about and the reason to raise the issue in the first place.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
Organizational culture, but which is not standing alone from the general practice on KM by the society as a whole it operates in. If KM is very much developed in the home culture of the organization, the atmosphere for better KM practice goes without saying much advanced in comparison with its counterparts in other countries. Technology is always available, but it does not mean people would necessarily buy it, does it? People are social animals, who would follow their culture to fit the best way they could. Content is intended dynamic and interactive for its usefulness, for which what KM is aimed to make it possible.

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
a core factor to success

What are your organisation's current Knowledge Management issues?
Rewards to better KM methods and practice.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
No

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No

Do you have any Knowledge Management components within your Information Technology strategy or programme?

No

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
No

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?

Are not planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

I**s it mandatory for staff to save information into the Client Management System?**

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago
Who has responsibility for managing the Intranet? (*Please specify business unit and/or position title of the individual(s) responsible.)*
Division for Computer Network Management, Department of Information, CCPIT

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Division for Computer Network Management, Department of Information, CCPIT

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.

- Internal document processing (approval procedure)
- Administrative notice (call for meeting and the like)
- Archiving recent document
- Reading reports relevant to ones work
- Others

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.ccpit.org

When did you first implement a website?
2-3 years ago

Who has responsibility for managing the website?
(Please specify business unit and/or position title of the individual(s) responsible.)
Division for Computer Network Management, Department of Information, CCPIT

Who has responsibility for training staff on how to use the website?
(Please specify business unit and/or position title of the individual(s) responsible.)
Division for Computer Network Management, Department of Information, CCPIT

Please list the top five things your website is used for in order of highest use to lowest use.

- Publicity to the general public
- Trade promotion activities forecast
- Email usage (a web page dedicated to email service to CCPIT staff)
- Business matching for importers and exporters
- Online library

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.
Sustainable programmes and important event files are to be kept as Long Term Files (permanent), Temporarily important files are to be kept as Short Term Permanent Files (15 years). All files are catalogued by a specialized division under general office of CCPIT.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Organizational structure. Different departments have their respective classificaiton code for future reference in chronicle order.

Who has responsibility for Records Management in your organisation?
(Please specify business unit and/or position title of the individual(s) responsible.)
General office of CCPIT

Have you implemented an Online Library Management System within your organisation?
Are not planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*

- Staff 0
- Clients 1
- General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are not planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Are not planning to implement
Central repository of best practices, guidelines and manuals	Are not planning to implement
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Are not planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes
What are the core research databases and resources your organisation uses*?*
(Please list in the space provided below.)
The CCPIT membership companies data base.

Does your organisation share information with other Government agencies?

Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
Customs General of PRC, import and export data

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
An online system on membership basis is operating, by which member companies could retrieve trade opportunities

What is the MAIN contact point within your organisation for exporters and companies?
Other

Please specify
email and telephone inquiries to a designated staff in CCPIT plus offshore offices

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
No

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Awareness of the benefit brought about by KM.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Not applicable

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
Not applicable

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
Not applicable

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?
no

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
It is conservative and facing lots of challenges. Different departments are not accustomed to sharing knowledge unless absolutely desired for a joint project. Predecessors are not required to exhaust their know-how to their successors. KMs function of sharing and inspiring could only be possible in smaller group like at division level, the smallest unit in the organization. Intra departmental projects are very much challenging, intra division ones are less so.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
Knowledge flow confines within small group with immediate common interest. KM benefit does not apply beyond. Hierarchy, ranking and the like are important indicator of knowledge possession. Things are changing though, very fast indeed, but traces of tradition are obvious.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
Yes

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
no

7. About the respondent

What is your job title?
Deputy Director, Division for International Organizations Affairs, Department of International Relations, CCPIT

What are your key responsibilities? *(Please describe.)*
My organizations daily work on cooperation projects as well as communications with IGO and NGO in the world, basically programmes and events under APEC framework, ITC (International Trade Centre), PBEC (Pacific Basin Economic Council), ATPF (Asia Trade Promotion Forum). The China national secretariats to ABAC (APEC Business Advisory Coucil) and PBEC are also within my jurisdiction. I have close working relations with Strategic Planning specialists and Information Dept. of CCPIT due to the nature of my portfolio. The present questionnaire is answered with their kind assistance and support.

How long have you been in your current position within your organisation?
>5 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.

- Director, Logistics Committee, ICC (International Chamber of Commerce) China National Committee
- Technical Advisor, EU-China Partenariat 2002
- Desk Officer, EU cooperation affairs
- Deputy Representative, CCPIT Sydney Office
- Desk Officer, Asian and African Affairs Division, in charge of trade promotion projects with Korean, Turkey, Israel and Arab countries

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?
No. But the above views and opinions are of the personal perspectives, including mine and those of the IT technicians,archive staff and strategic planning specialists I interviewed for the completion of this questionnaire, not necessarily representing official views of CCPIT.

Hong Kong China

1. Organisational Overview

Please state the name of your organisation.
HONG KONG TRADE DEVELOPMENT COUNCIL

What is your organisation's mission?
asist HK companies to explore the mainland and the world markets; promote the role of HK as an international business platform; to attract international enterprises to use HK's business platform

What other Government or Economic Development Agencies in your country are involved in Trade Promotion*?* *(Please state below.)*

How many staff do you have located onshore or within your country?
around 700

How many staff do you have located offshore or overseas?
around 200

How many staff do you have in total?
around 900

How many offices do you have located onshore or within your country?
one in HK

How many offices do you have located offshore or overseas?
41 in mainland China, Taiwan, and overseas

How many offices do you have in total?
42

What are your organisation's key sources of revenue*? (Please state the revenue type and amount for each type in your local currency.)*
Trade Fairs; Trade Pbublications; Government Subventions

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
HK$1,588 m

What are your organisation's key performance indicators?

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?

the management of the sharing of information, ideas by means of technology; human resources mgt; and communication channel, in order to maximise efficiency

Do you think Knowledge Management is more about organisational culture, technology, people or content?
the first three

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
TPO always serves a large variety of customers, objectives and markets; hence demands wide range of info. Good knowledge mgt is there esential and could improve efficiency.

What are your organisation's current Knowledge Management issues?
ways and pace to enhance employees' market and job knowledge in order to adapt to markets development

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Unsure

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?
Unsure

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)IT; administration)*

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
No

Is saving documents into the Document Management System a manual or automatic process?
Automatic/System Generated

Have you implemented a Client Management System within your organisation?
Are not planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?
Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
IT; corporate communication Dept

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
no need for training, the webpage is very user-friendly

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.

- -internal telephone directory||-accounting system
- -e-processing (e.g. e-leave; expenses claims etc)
- internal circulars
- e-learning

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.tdctrade.com

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
E-commerce Dept; IT Dept

Who has responsibility for training staff on how to use the website?
(Please specify business unit and/or position title of the individual(s) responsible.)
no need

Please list the top five things your website is used for in order of highest use to lowest use.

- event schedule and info
- reserach material
- web-cast

-

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
dont know

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Admin Dept; IT

Have you implemented an Online Library Management System within your organisation?
Are not planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*

- Staff 0
- Clients 0
- General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
- joint promotion event calendar
- web-linkages

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)
dont know

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

- regular e-newsletter
- e-reserach reports and market news

What is the MAIN contact point within your organisation for exporters and companies? Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why?
(Please describe.)

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Good

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
No

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
Yes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
this reersach is completed by Peggie Liu, Manager. International Marketing

What are your key responsibilities? *(Please describe.)*
promote HK as an international business platform

How long have you been in your current position within your organisation?
>5 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Indonesia

1. Organisational Overview

Please state the name of your organisation.
National Agency for Export Development (NAFED)

What is your organisation's mission?
- To formulate policy and establish guidelines to encourage and support the exports of non-oil and gas products
- To provide information services and market coordination.
- To conduct and coodinate export promotion
- To expand the range of export produ

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
We are the only one official agency in Indonesia involves in Export Trade Promotion. However, each technical Ministry (eg. Ministry of Agriculture) has its own bureau of promotion as well.

How many staff do you have located onshore or within your country?
386 staffs including dispatch of staff to provinces)

How many staff do you have located offshore or overseas?
12 Staffs

How many staff do you have in total?
398

How many offices do you have located onshore or within your country?
1 Office in Jakarta plus 4 subsidiaries cooperation with provincial governments

How many offices do you have located offshore or overseas?
6 Offices

How many offices do you have in total?
7 Offices

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
National Government Budget

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
Rp. 120.825. Billion in 2004 ~ US$ 13,42 Million

What are your organisation's key performance indicators?
- Number of NAFED information network users
- Number of inquiries received from overseas buyers, and number of exporters contacted
- Number of visiting overseas buyers served by NAFED
- Number of overseas tradefairs participants increased and coordinat

You have reached the end of Section 1. Do you have any other comments about your organisation?
NAFED has to be more focussed on market and product priorities programme.

2. Defining Knowledge Management

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Inspiring and enhancing the people managing the organisation

What are your organisation's current Knowledge Management issues?
Human Resource, Information Technology, and Culture of Organisation

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
KM is a system to empower the entire staff to share in the development of the Agency
-the management of organisation should adopt the Knowledge management to meet the customer satisfaction
-We define KM is the process through which organisation generate valuable services or output that needed by their clients, customers and stakeholder by being more effective and efficient use their intellectual and Knowledge based assets.
- the management of organisation should adopt the Knowledge management to meet the customer satisfcation"

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No, but plan to in the next 2 years

Do you have any Knowledge Management components within your Information Technology strategy or programme?
Yes

Please give details.
- Competent staffs in IT equiped with reliable softwares and hardwares
- Tentative master plan of IT development

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
Nafed is ongoing to develop the component of knowledge management such as people, hardwares, and sotwares,

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)*
1-2 years ago

What Document Management System product/software do you use?
Customized software operated on an open source platform

Who has responsibility for managing the Document Management System?
(*Please specify business unit and/or position title of the individual(s) responsible.)*
Director of Information and Export Training

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Director of Information and Export Training

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Manual

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
2-3 years ago

What Client Management System product/software do you use?
Customized software that operated to serve clients through monitor

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Director of Export Information and Training assisted by IT manager Head of Database and Information Network Division

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Director of Export Information and Training.

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago

Who has responsibility for managing the Intranet? (*Please specify business unit and/or position title of the individual(s) responsible.)*
Director for Information and Export Training

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Director for Information and Export Training

Is your Intranet accessible from both onshore and offshore?
Onshore only

Please list the top five things your Intranet is used for in order of highest use to lowest use.

1. The information of trade inquiry
2. The statistics of international trade
3. The information of exhibition
4. Trade directory
5. The information of library

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.nafed.go.id and http://www.nafedve.com

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Director of Information and Export Training

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Head of Database and Information Network,Div

Please list the top five things your website is used for in order of highest use to lowest use.
- News
- Importer & Exporters profile
- Offer to sell and offer to buy
- Market Information/ Product Information/ Price Information
- Trade Promotion
- Trade Statistic

Do you have any Government record keeping requirements?
Yes
If yes, please describe your Government record keeping requirements.
Record keeping requirements done by law under controlled by the National Archives Board

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Functional

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Secretary of NAFED

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
No

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 0
Clients 0
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
Local Area Network and intranet.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Head of Database and Information network division

Do you have a policy within your organisation around capturing and archiving emails?
Yes

What are the key components of your email policy?
Any official should use domain name (nafed.go.id) on his/her email address for formal email.

Central repository of research undertaken	Are planning to implement
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Are planning to implement
Knowledge map of staff skills and expertise	Are planning to implement
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are planning to implement
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*
Foreign Trade data statistic / Central Board of Statistic and ITC

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
Ministry of Trade and other Ministry concerned to share the information of export and market

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
No

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?
Other

Please specify
Website, offshore office, telephone call center.

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
The KM technologies and iniatiatives are not easy to prepare and implement since the management just started to do

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Commitment of The Top Management

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Giving appreciation to the staff and reward proportionally
If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Lack of Staffs motivation, Communication gap, and limited number of IT's staffs

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
Yes, to build the culture eventhough the progress growing slowly.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?
To measure the benefit of Knowledge Management initiatives is very difficult since the organisation just started to plan implementation of initiatives.

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Eventhough slow progres but it is developing

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
Yes. a liitle bit of cultural barrier

Do you think knowledge sharing behaviours should be rewarded?
Yes

I**s knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?**
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
Yes

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
Improving the conducive environment of work

7. About the respondent

What is your job title?
Head of Information and Export Training

What are your key responsibilities? *(Please describe.)*
I am resposible for information services and Library Services, Business Consultation and organizing Permanent Trade Display and Export Training Programmes.

How long have you been in your current position within your organisation?
1-2 years

Have you held any other positions within your organisation?
No

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?
Lets start to begin Knowledge Management System.

Japan

1. Organisational Overview

Please state the name of your organisation.
Japan External Trade Organization (JETRO)

What is your organisation's mission?
To promote mutual trade and investment between Japan and the rest of the world

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
JICA (in relation to capacity building)

How many staff do you have located onshore or within your country?
840

How many staff do you have located offshore or overseas?
760

How many staff do you have in total?
1,600

How many offices do you have located onshore or within your country?
39 (JETRO Headquarters Tokyo, JETRO Osaka, Institute of Developing Economies and 36 regional offices)

How many offices do you have located offshore or overseas?
76 offices (57 countries)

How many offices do you have in total?
115

What are your organisation's key sources of revenue? (*Please state the revenue type and amount for each type in your local currency.)*
Subsidy: 28.8 billion yen (US$ 274.3 million)
Commission: 7 billion yen (US$ 66.7 million)
Self-fund: 9 billion yen (US$ 85.7 million)
(FY 2003, 1US$=105yen)

What is the total operating budget of your organisation*? (Please state amount in your local currency.)*
44.8 billion yen (US$ 427.7 million)

What are your organisation's key performance indicators?

- Achievement appearance of medium term target
- Each project or activity would be measured by suitable indicators, such as;
- Customer satisfaction
- Number of foreign investments
- Number of business talks

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
To enhance organization fs responding ability through share information, knowledge, experience and challenge. It would enable advanced information and service offering to the customer and bring their better satisfaction.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
organisational culture

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
a) Effective business operation
b) Smooth communication among domestic/overseas network
c) Homogenization of customer services

What are your organisation's current Knowledge Management issues?
We have pur priority to areas that meets customer f concern. (e.g. FDI to Japan, consultation, intellectual property rights, China business)

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?
Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
For more effective business operation, and improved customer services

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Senior Management

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Quite widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
Subsidy: 10 million yen (US$ 95238)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System?
(Please select only one.)
2-3 years ago

What Document Management System product/software do you use?
Custom developed software using web browser

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
Administrative Affairs Division

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Administrative Affairs Division

Is your Document Management System accessible from both onshore and offshore?
Onshore only

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Manual

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
2-3 years ago

What Client Management System product/software do you use?
Self-developed by using Oracle soft

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Information Systems Division

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Information Systems Division

Is your Client Management System accessible from both onshore and offshore?
Onshore only

Is it mandatory for staff to save information into the Client Management System?
Yes
Is saving information into the Client Management System a manual or automatic process?
Manual AND Automatic/System Generated

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Information Systems Division

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Information Systems Division

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
1. Notice
2. Personal rotation announcement
3. Extension number list
4. Internal Regulations
5. Manuals

Does your organisation have a website?

Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.jetro.go.jp/

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Public Relations Division

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Public Relations Division

Please list the top five things your website is used for in order of highest use to lowest use.
1) Trade Tie-up Promotion Program (online business matching program)
2) J-messe (database on trade fairs)
3) Overseas Information
4) JETRO Daily (daily news of global economy)
5) Manual for Japanese Private Importers

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Organizational (Files registered by section)

Who has responsibility for Records Management in your organisation?
(Please specify business unit and/or position title of the individual(s) responsible.)
Administrative Affairs Division

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
No

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 0
Clients 0
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
Exchanging registered information on online-business matching program with KOTRA (Korea Trade Investment Promotion Agency)

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Business Service Division

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Are not planning to implement
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Are not planning to implement
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*
Information collected through Domestic/Overseas network
(Also make use of commercial databases like World Trade Atlas.)

Does your organisation share information with other Government agencies?
No

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
Business Matching Database (TTPP): http://www3.jetro.go.jp/ttppoas/index.html
Free online business partnering database that allows companies and individuals around the **world to search and browse through over 40,000 business proposals.**

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
Yes

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
To identify the needs among staff and respond to it.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Examination remains as future tasks (Have not examined yet since only 6 months have passed since we have set up KM system.)

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
Examination remains as future tasks (Have not examined yet since only 6 months have passed since we have set up KM system.)

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
Found difficulty in coordinating with the existing systems.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Existing problem:
1. Reports to be kept only in each section
2. Frequent personnel rotation causes insufficient knowledge and experience stock and turn over
3. Knowledge gap between experienced and young staff
|4. Need improvement in better communication among all offices of domestic and global network

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
Bureaucracy (vertically divided mindset)

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
Yes

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?

staff, Strategic Coordination Office, Planning Department

What are your key responsibilities? *(Please describe.)*
*I am not a KM manager, but only take responsibility as the contact point of this questionnaire.

How long have you been in your current position within your organisation?
1-2 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Republic of Korea

1. Organisational Overview

Please state the name of your organisation.
KOTRA (Korea Trade & Investment Promotion Agency)

What is your organisation's mission?
Supporting external trade of small-and-medium sized companies and attracting foreign capital into Korea

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? (Please state below.)
-Ministry of Commerce, Industry and Energy
-KITA
-Korea Export Insurance Corporation

How many staff do you have located onshore or within your country?
259 staff

How many staff do you have located offshore or overseas?
301 staff

How many staff do you have in total?
560 staff

How many offices do you have located onshore or within your country?
1 Head office , 13 domestic trade center

How many offices do you have located offshore or overseas?
103 offices (Korea Trade Center)

How many offices do you have in total?
117 offices

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
-Trade support service : 140 billion won
-Lease earnings : 3 billion won
-Unit business earnings (Educational fee, advertisement earnings etc) : 17 billion won

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
218 billion won (2004)

What are your organisation's key performance indicators?
-Export quantity contribution
-Inbound investment contribution
-Customer increase
-Customer satisfaction index
-Amount of revenue
-Overall business efficiency

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge Management is that managing the knowledge based on the corporation core competency so that maximizing the capability of business and human resources.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
More about content and organisational culture

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
-Enhancing productivity and efficiency by boosting the reuse of knowledge
-Strengthening the capability of human resources
-Implementation of earning organization

What are your organisation's current Knowledge Management issues?
-How to support the organization new vision
-How to accumulate best practices more efficiently
-How to enhance the value of knowledge
-How to implement Knowledge Management System more focused on customers

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
The reason is that we wanted to enhance the organization’s productivity and capability by facilitating accumulation and share of knowledge.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Board Level

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Very widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
About 0.01%, and we have a plan to increase the amount of budget related to KM next year
Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? (*Please select only one.)*
3-5 years ago

What Document Management System product/software do you use?
Bizflow groupware implemented by Handysoft co.

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
The application manager of Information Technology team

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The application manager of Information Technology team

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Automatic/System Generated

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
1-2 years ago

What Client Management System product/software do you use?
Samsung SDS has developed all the functions (Didn't use the package software)

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The CRM coordinator of customer management team

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The CRM system coordinator of e-KOTRA team (Information Technology team

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Automatic/System generated

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The application manager of Information Technology team

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The application manager of Information Technology team

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
Email, Document management, Communication (bulletin board, community etc), Knowledge management, Schedule management.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.kotra.or.kr

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The homepage manager of Information Technology team

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The homepage manager of Information Technology team

Please list the top five things your website is used for in order of highest use to lowest use.
Trade information, Business requisition, Q&A, Company information, Online-community

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
Same as Document Management System

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Organisational structure

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The application manager of Information Technology team

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
Yes

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 0
Clients 0
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
- Messenger : Real-time chatting, Online-conference room, Voice communication etc
- Cyber conference : Video conferencing, Real-time chatting etc
- Online community : Notice, resource sharing room etc

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The application manager of Information Technology team

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Have implemented
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*
Trade statistics databases, Economic trends from the various websites, local paper and news media

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
- Sharing company information with 'Korea Chamber of Commerce & Industry'
-Sharing information about inbound investment with local government etc
-Sharing 'trade leads' with JETRO(TPO of Japan), EC2, Agrotrade etc

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
We are operating 'BuyKorea' (Trade portal site) which captures trade opportunities from various sites and forwards them to the customers systematically.

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
Yes

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Corporate culture, Business process(need to be optimised), Employees' reception rate and volition etc

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
At first, we started from BPR (Business Process Re-engineering) project to optimise the business processes and develop 'Knowledge Map', and then launched consulting project to implement the most suitable knowledge management model. The scale of the project was huge, and the most successful part is that every member recognized the importance of knowledge because it is critical part of the success of knowledge management

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

scale of the project was huge, and the most successful part is that every member recognized the importance of knowledge because it is critical part of the success of knowledge management

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
At first, there are some resistance, but staff's mind was changed to acceptance by CEO's strong will and culture management (Opening knowledge management seminar, conference etc).

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
All members recognize the importance of knowledge and core competency, and most of the staff are positive to share their knowledge(Know-how). These days, manpower policy is inducted and we are focusing more on how to implement learning organization and enhance employee's capability.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
As states above, all members are not reluctant to share their knowledge. The current issue(or problem) is how to enhance the quality of the knowledge.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
Yes

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.
- Prize money: Once every 6 months, qualified knowledge providers are rewarded by money
- Incentive: Additional points to personal record were provided to someone who registers knowledge actively.
- Knowledge festival: Opened once a year, and active p

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
Yes

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
The captured information through exit interviews is referred to improve the inefficient organization structure, but the separation rate is lower than 2% of the total so that it doesn't happen often.||||

7. About the respondent

What is your job title?
Innovation & strategy coordinator

What are your key responsibilities? *(Please describe.)*

How long have you been in your current position within your organisation?
3-5 years

Have you held any other positions within your organisation?
No

I**f you have held other positions within your organisation please list below.**

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Mexico

1. Organisational Overview

Please state the name of your organisation.
Bancomext – The Mexican Bank for Foreign Trade

What is your organisation's mission?
The mission of the Bank is to boost the growth of Mexican enterprises, in order to increase their participation in global markets by offering financial and export promotion services to strengthen their competitiveness. The Banks is also in charge of the promotion of foreign investment inflows.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
The Ministry of the Economy, the Ministry of Agriculture, Livestock, Rural Development, Fishery and Nourishment and the Ministry of Foreign Affairs.

How many staff do you have located onshore or within your country?
137 + 47 = 184

How many staff do you have located offshore or overseas?
127

How many staff do you have in total?
311

How many offices do you have located onshore or within your country?
36

How many offices do you have located offshore or overseas?
30

How many offices do you have in total?
66

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency).*
The income from the financial services of the Bank.

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
During 2003, the Bank spent 605 million pesos to provide the export promotion services. (exchange rate at the end of 2003, 11.2372 pesos per US dollar)

What are your organisation's key performance indicators?
"As far as export promotion services is concern, are as follows:
In Mexico

1. Information (requests answered)
2. Bancomext web page (hits)
3. Exportanet (foreign demand for Mexican products and number of suscribers)
4. Training (number of courses, participants and hours of instruction)

5. Technical assistance (projects and companies assisted)
6. General and specialized consulting

Abroad

1. Information requests
2. Products promoted internationally (business agendas, promotion of exportable goods, research on distribution channels, research on country markets, other services)
3. International events (number of business assisted, events organized, exports generated)
4. Foreign investment promotion (number of investment projects assisted and amount of intended investment)"

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge Mangement could be defined as the skills and information that the person possess in order to develop its function. In terms of Bancomext the organisation has been very concerned with selected employees appropriate to the function that they develop. Why because in the economy it is the only insitution responsible to promote the foreign trade of Mexico therefore the persons that are promoting the foreign trades of Mexico should have the qualifications required to develop the job. The organisation has implemented things that have more than 70 years particular programme that all employees have to align their activities to their goals of the institution. So all employees and divisions have to redefine their functions, their roles, their activities in order to be aligned to their objectives and goals of the institution.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
I believe that it is more about the organisational culture.

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
See above.

What are your organisation's current Knowledge Management issues?
Knowledge Management in our organisation. The insitution is involved in a whole programme that is in place in the institution in order to find out what are the functions that each area/division/individual have to develop in order to accomplish its role. Therefore I belive that KM is very crucial in order to get the goals that this programme in particular has been pursuing. We call it continuous improvement programme. Quality and continuos improvement programme.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
Appears everywhere. Its not only in documents. Appears in some art that is posted within the facilities. Also our our internal means of communication. Namely the intranet and some other printed material that is distributed. We have improved.

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

See above.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Other

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Quite widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
There is an area responsible to implement, to function as a leader of this programme. Within each area or division there is one person that is part of a group. This group often hold meetings in order to assess how the development of the different issues they have to cover. It's a very group. In order to achieve goals they often hold meetings and they have an internal electronic system and milestones to achieve.

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?

Have implemented

When did you first implement a Document Management System? *(Please select only one.)*
3-5 years ago

What Document Management System product/software do you use?
Control Express – Don't know if it is software accessible to every company but it is software the instititution has established.

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Responsibility belongs to the person who is putting the files into the system. I'm not sure who is maintaining the system itself.

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
\We have 2 systems. One system handles the documents that the Director General Institution is delivering to various areas of Bancomext. There a document control for documents. The other system that we have, lets say in my office in Taiwan, if we do some research in some field these document goes into a system that is holding all the research that the institution is doing. There is another system that holds those documents that we have done but those we sell to companies and customers.
We receive training through internet. There is an area responsible for this we call technical division. They implement this kind of special system and they train us through email and internet. They meet with an external supplier, most of the time they are involved with some software.

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Manual

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
1-2 years ago

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Project Manager for External Promotional Management Systems.
|Survey was made by external company. The current client system, we use the Balance Scorecard that is an integral system. One of them includes customers.

They survey in an automatic way. Once you deliver the product and complete the task, as far as I know the system sends an email or a questionnaire to the customer.

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Project Manager External Promotional Management Systems. She is the link person between the people who back up the system everyday and the contact with all offices abroad and in Mexico. This person functions as link if there is a new directive into the system, or new updated way to manage the system.

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
In terms of the maintenance of the intranet, we have an area that is responsible for the systems of the institution. Intranet has different sections, each section looks after their content. For example the Department of Human Resources is responsible for updating the content about Human Resources.
Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
No not really. At the beginning yes. Nowadays every person navigates through the system and get the information they want.

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
1. To communicate to all the staff about the institutional communication. To keep everyone informed about the institution.
2. In Mexico we have a special system to help with all the Fringe Benefits for the employes, loans, medical services.
3. Used to know about the performance of the bank. We receive emails to say please look for this information.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.bancomext.com/Bancomext/index.jsp

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
About the system itself it is the computer and system division. But there is an area which is responsible for its content for the design of the portal. Different to intranet. We have an intranet that is different design and we have a portal that separate divisions are responsible for.

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
If you are just to surf on to the portal not necessary for training. But if it is to update and maintain content its very simple. Just a matter of clicking two or three parts of the portal and to have a special code and you update information. Certainly you have to receive training to do that.

Please list the top five things your website is used for in order of highest use to lowest use.
1. Know about the promotional services of Bancomext that we render to the export community.
2. To access information about the credits and loans, because we are a banking institution.
3. To inform the export community of the different seminars or training courses that we provide to Mexican companies.

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.
If it is about accounts or accounting you need to keep original receipts for at least 5 years.
You have to keep electronic files for more than 5 years. As far as I know there is no compulsory requirement to keep the research documents and filing.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

As far as I know there is not a specific classification system. The document management system that stores research and surveys from all the offices abroad and in Mexico has some order to follow based around subject, sector and product.

Who has responsibility for Records Management in your organisation*?* *(Please specify business unit and/or position title of the individual(s) responsible.)*
If it is about accounts of the institution certainly the Accounting department is responsible. If it is about international promotion offices the technical division is responsible for maintaining the system.

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
No

If you have a physical library, is your library open to your clients, general public or just staff*.* *(Please select all that apply.)*
Staff
Clients
General Public

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function. N/A Some years back we tried to implement chatting from Mexico with our offices in America or Europe doing some consulting to Mexican companies. Out of that all of the communication is in Bancomext offices. But now all communication by email and phone.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented

Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(*Please list in the space provided below.)*
We have a planning division that do research, customer satisfaction, trends in the enconomy, foreign trade etc. Based in Mexico.

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
Government Ministeries – Ministry of Economy, Ministry of Foreign Affairs.
Private associations – National Chamber of Industry, Foreign Trade Business Council.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
Key information into commercial trade opportunities system, in Mexico, Mexican company have access to this system. Access through the website but more of a portal.

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
Once we had a Director General that she used to say that there is no more need for people to go to our offices, they can get all information through our website. In Mexico the culture is still you have to meet with people.|| ||FS – Stands for 5 Japanese words that is intending to have a paperless office, to have everything in order, to maintain discipline, clean, only items you require. It's incredible you go to Bancomext and you don't see paper. Very few filing cabinets. Very seldom paper documents. Most of the files are kept electronically. Self discipline programme. 5 words from Japan, discipline, maintain. Started implementing in Bancomext in 2001.||

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?

Yes

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Share with your colleagues or the group that you belong to in order to encourage them to participate and that way you made it more value add to the service chain.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
International external system that we are operating now is quite successful. However if we talk in this case about a service that this institution renders to customers the Investment portal for investors and Government agencies use it to attract investors. Very successful. A lot of offshore and onshore people are involved in this initiative to help the investment portal. Through this system you have an organised database of investors worldwide.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
A couple of years ago we had an idea that we would print a magazine in English that should be distributed in Mexico and abroad. The live of the magazine lasted for a few months, almost a year. The magazine in order to make it more world wide known, you should invest in adds to make it more competitive in the market. We were trying to touch on some business that is not our business, not our core function of the institution.

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
Any change in the daily duties of a person always encounters some resistance at the beginning. There is resistance but we are aware about it and we work on it. Resistance to fully understand the main benefits of the change.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
We are in primary stage, we have being trying to aliniate our culture in a more systematic way. For instance the work on contiuous improvement. We have progressed, we have put the seed into the employees to this approach, now we have to consolidate and move forward.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
n/a

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
Yes

Does your organisation have a formal mentoring or coaching programme?
Yes

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
Yes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Trade Commissioner of Mexico to Taiwan

What are your key responsibilities? *(Please describe.)*
Promote foreign trade of Mexico in particular exports. Encouraging investment into Mexico. Provide update information on econnomic and trade issues in Mexico in Taiwan

How long have you been in your current position within your organisation?
1-2 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
Trade Commissioner in South East Asia, Japan. In Mexico General Manager for Asia, Asia Pacific as well as a number of other positions. With organisation for 23 years.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?
I think nowadays the competition is worldwide. Institutions like Bancomext and NZTE we have to modernise our services and systems to contribute to companies in their efforts to reach markets. As long as we improve and we put into practice knowledge management systems we will be more qualified to provide services to our customers. Perhaps in a way we can say it's the intellectual assets of the institution.

New Zealand

1. Organisational Overview

Please state the name of your organisation.
New Zealand Trade & Enterprise

What is your organisation's mission?
New Zealand Trade and Enterprise (NZTE) is committed to improving the international competitiveness and sustained profitability of New Zealand businesses. We will achieve this through our 10 offices in New Zealand and 38 offices overseas by:
• assisting New Zealand business to be successful internationally and increasing the net economic contribution of business to New Zealand;
• providing a range of high-quality, responsive services and programmes that help to stimulate and grow internationally competitive businesses; and,
• working in partnership with sectors, regions and businesses, and with private and public sector allies to achieve these objectives.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Ministry of Foreign Affairs and Trade - trade policy work

How many staff do you have located onshore or within your country?
380

How many staff do you have located offshore or overseas?
175

How many staff do you have in total?
555

How many offices do you have located onshore or within your country?
10

How many offices do you have located offshore or overseas?
38

How many offices do you have in total?
48

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
Central Government funding NZ$ 149 million
Revenue from companies NZ $1.5 million

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
NZ $151 million

What are your organisation's key performance indicators?

This Statement of Service Performance provides the key performance measures and targets for the services delivered by NZTE in 2004-05.

- **Output Class 1** $39.847m ENABLING SERVICES: FACILITATING THE DEVELOPMENT AND IMPLEMENTATION OF SECTOR AND REGIONAL STRATEGIES. This Output Class includes services that will support collaboration, linkages, and the development and implementation of strategies between and among sectors, regions, clusters of businesses, and government aimed at exploiting opportunities for growth and overcoming constraints to growth. Facilitating the recognition, development and implementation of sector and regional strategies and linkages between firms and groups of firms will enhance New Zealand's growth prospects both in the medium and long term.
- **Output Class 2:** $32.865m. ENABLING SERVICES: PROMOTION OF NEW ZEALAND BUSINESS. Output Class 2 provides for the promotion of New Zealand's products and services both on and offshore to attract investors and to support the development of international trade by New Zealand businesses. It also provides for services aimed at building a supportive business environment in New Zealand, by fostering and supporting a culture of entrepreneurship and business success and by promoting the benefits and value of internationalisation and international connections.
- **Output Class 3**: $7.924m FOUNDATION SERVICES - BUSINESS INFORMATION AND ADVICE This Output Class provides for the delivery of a range of business assistance services targeted at a wide business audience with a particular focus on smaller firms, entrepreneurs, start-ups and new exporters. The services are largely focused on building and supporting the development of management skills and capabilities through the provision of information and advice where appropriate
- **Output Class 4** $12.558m FOUNDATION SERVICES – TRAINING AND CAPABILITY BUILDING Output Class 4 provides for the development procurement and/or delivery of training services to build and enhance the management capabilities of small businesses, entrepreneurs, start-ups and new exporters.
- **Output Class 5**: $23.237m GROWTH SERVICES - CUSTOMISED INFORMATION AND ADVICE This Output Class provides for the development and delivery of customised information and advice to New Zealand businesses that are committed to achieving high growth. The services are aimed at assisting companies to identify and respond to opportunities for growth and/or address constraints to growth.
- **Output Class 6**: $33.896m8 GROWTH SERVICES - FACILITATING BUSINESS OPPORTUNITIES This Output Class provides services relating to the identification, qualification and pursuit of business opportunities. The services provided are customised to support and assist business with medium to high growth potential and objectives to achieve that potential. While there is provision for the identification of business opportunities within New Zealand, the outputs purchased are largely focused on international market opportunities.
- **Output Class 7**: $4.371m GRANT MANAGEMENT AND POLICY SUPPORT NZTE will administer a number of grant schemes on behalf of the Crown. This Output Class provides for the purchase of services that will ensure the delivery of grants as per agreed policy guidelines and criteria. It also provides for a range of services that support government

policy development particularly related to the development of "economic and regional development" and ongoing NZTE delivery.

- **Output Class 9**: $6.000m NEW ZEALAND'S PARTICIPATION AT EXPO 2005, AICHI,JAPAN NZTE will provide services to enable New Zealand's participation at Expo 2005 (Aichi, Japan), in recognition of the importance of New Zealand's economic and political relationship with Japan. The Expo will run from March to September 2005 and have a New Zealand presence, in terms of both community and private sector engagement. New Zealand's participation will consist of the design, build and operation of a single module pavilion; and the undertaking of communication and partnership activities.

You have reached the end of Section 1. Do you have any other comments about your organisation?
No

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge management is a professional discilpline, that utilises a mix of technological and social network skills, to better document, capture and utilise sources of knowledge existing within an organisations

Do you think Knowledge Management is more about organisational culture, technology, people or content?
It is certainly a mix of technology and organiational culture - KM is more appropriate in large organisations, especially those where knowledge needs to be transferred across boundaries

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Two roles are
1. Harnessing existing knowledge to improve the efficiency of the TPO, and
2. Transferring knowledge to allies and companies who can use and build on this knowledge to their own firm's competitive advantage

What are your organisation's current Knowledge Management issues?
KM has been in a way pidgeon-holed and there is a not a realisation that KM solutions are appropriate for other parts of the organisation

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
It is a complex area to define - many organiations do "KM"tasks without defining the term

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
It resulted from a major KM study conducted by KPMG four years ago. There was a realisation that we needed to be more efficient in our processes generally, and better KM was regarded as a possible solution

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Senior Management

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Quite widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?
Do you expect this to increase, decrease or remain the same as this year? (Please state the revenue type and amount for each type in your local currency.) less than 1%
Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
again it could be noted that there are KM strategies being implemented outside the scope of the KM Team. These initiatives are not generally regarded as KM initiatives in NZTE, but would normally be defined as such in some other organisations

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)*
>5 years ago

What Document Management System product/software do you use?
iManage

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
KM Team

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
the IT Team, backed up by KM support

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Manual AND Automatic/System Generated

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
>5 years ago

What Client Management System product/software do you use?
Pivotal

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
owner is the Strategy Team, but there is extensive input from other business units

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
IT

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?

>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
KM Team

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
mainly the KM Team

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
1. Finding people and phone numbers
2. Policies and procedures
3. Team information
4. General corporate information
5. links to other applications and the internet

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.nzte.govt.nz

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Manager online services, who is part of the "business capability" team

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
none given

Please list the top five things your website is used for in order of highest use to lowest use.
Information on NZTE programmes||links to offices||news stories||information for staff links to other websites for training,investment, exporting and government procurement

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.
The Archive Act 1957 requires government agencies to keep all public records and to forward these to Archive NZ after a period of 25 years. A new Public Records Bill will become law in 2005. This makes it clear that all non-routine emails are considered public records, and provides for regular audits of government agency compliance with the law

Do you have a Records Management policy?

Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
Foremost which has been renamed Documentum Records Manager. This is integrated with the DMS

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
organisational structure, but we are planning to change this later this year

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
KM Team

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 0
General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
1. iManage Worksite - shared DMS that can be used as a collaboration site for teams and projects. Can host threaded discussions, and be used to assign tasks
2. MarketNZ.com - website which incorporates news feeds specific to individual needs

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
KM/IT shared

Do you have a policy within your organisation around capturing and archiving emails?
Yes
What are the key components of your email policy?
policy does oblige staff to retain their emails and suggests that they put key emails into the DMS. User compliance is not optimal, so we are working on ways to ensure capture, such as a database that automatically captures emails.

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Are planning to implement
Central repository of best practices, guidelines and manuals	Are planning to implement
Knowledge map of staff skills and expertise	Have implemented
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are planning to implement
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)

- external databes are Onesource and Factiva. These are restricted to the research team Kompass also used and is deployed to all users, as is the EPIC database
- World Trade Atlas used for import/ export statistics.
- Corporate Strategy board was also used as a source of strategic planning materials but we are not planning to renew our subscription

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
there is a core group of economic development ministries : Treasury; Ministry of Foreign Affairs; Ministry of Economic Development; Ministry of Research, Science & Technology and the Deprtment of Labour. Meetings are held at CEO and senior management level, and a lower level research group has been established

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
this is managed by Market New Zealand.com - www.marketnewzealand.co.nz. Overseas buyers can search the site for New Zealand products and either email inquiries drect to suppliers or send via a central system. These inquiries are matched to the database, using Kompass classifications. Offshore buyers are contacted by their local NZTE office, and information on their bona fides is posted onto the site and can be viewed by potential NZ exporters

What is the MAIN contact point within your organisation for exporters and companies?
Account manager

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
systems need to be easy to use- almost invisible!||KM solutions need to address real organisation needs and the whole of the busienss needs to be involved in the process of assessing approriate solutions

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Collaboration pages project- we worked very carefully with end uders in training them on the advantages of using the page approach.We had also done trial work with a major team to see just what they needed in terms of a collaboration page. We also fully understood the capability of the solution, and had extensively trialled the product prior to deployment

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*
file managment within the DMS - users have not been involved in preparing the file plan, and largely see no need to asign a file number to an electronic document. This has resulted in massive misfiling of electronic documents, which renders our file plan ineffective. We are being forced to rethink our approach to electronic filing of documents.

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
as above- the problem is that the file plan is needed for an out of business need (to meet Archive requirments). spending time assigning a correct file number does not yield any personal benefit for users, so they are disinclined to spend time on filing emails or documents correctly.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?

patchy - the organisation has gone through a merger and also a large organisational restructure in the past two years, and staff do not necessarily trust the system sufficiently to be keen to share information. There is also still poor sharing between teams- partially lack of trust, partially poor training, and partially lack of time. There is also poor connectivity between NZ and some of our offshore ofices, meaning that KM systems are too slow to use in these locations. There has also tradionally been quite a "cultural divide"between offshore and onshoe staff.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
There are probably similar in other TPOs. We oprate in many locations, with typically small offices in each location, staffed primarily by local employees. These staff will not necessarily be familiar with all the roles and responsibilities of the Head office TPO. This is quite difficult terrain in which to operate a KM strategy.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
High

Does your organisation conduct exit interviews with staff that leave your organisation?
Yes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.
used by individual managers

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?

GM KM

What are your key responsibilities? *(Please describe.)*
Manage the Knowledge Management team

How long have you been in your current position within your organisation?
1-2 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
Trade Commissioner Spain
Trade Commissioner Peru
Trade Commissioner Malaysia
Sector Manager – wine
Sectro manager agricultural technology

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Papua New Guinea

1. Organisational Overview

Please state the name of your organisation.
Papua New Guinea Chamber of Commerce & Industry

What is your organisation's mission?
Be a forum for our members to address their needs among themselves and to government and other authorities.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Trade Promotion Authority, also the Department of Trade and Industry.

How many staff do you have located onshore or within your country?
Two

How many staff do you have located offshore or overseas?
Nil

How many staff do you have in total?
Two

How many offices do you have located onshore or within your country?
One

How many offices do you have located offshore or overseas?
Nil

How many offices do you have in total?
One

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
Membership fees (PNG Kina 50,000) and corporate sponsorships (PNG Kina 50,000).

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
PNG Kina 100,000

What are your organisation's key performance indicators?
Membership feedback on the organisation, executive assessment on the staff.

You have reached the end of Section 1. Do you have any other comments about your organisation?
Unsure that our organisation is really one of your target ones on trade promotion though we do interact with trade promotion activities. In PNG we work on a microscopic level compared to larger countries.

2. Defining Knowledge Management

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?
Don't know

What is the role of Knowledge Management in a Trade Promotion Organisation?
How they can use matters such as queries and direct them to relevant companies/people so that they can trade. Also to be aware of what is on offer and market it within their budget to likely markets.

What are your organisation's current Knowledge Management issues?
We are a private sector organisation. Constantly challenged to present to government private sector realities that enable our members to compete on a level playing field.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No

Do you have any Knowledge Management components within your Information Technology strategy or programme?
No

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
Being a small country the private sector is more able to keep its ear to the ground and be directly aware of most of what is happening. Also given our size and budget as a small private sector body the executives are more easily in touch with what is happening inside the organisation.

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are not planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Are not planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Are not planning to implement

When did you first implement an Intranet?

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Intranet accessible from both onshore and offshore?

Please list the top five things your Intranet is used for in order of highest use to lowest use.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.

When did you first implement a website?
3-5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
In-house

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Please list the top five things your website is used for in order of highest use to lowest use.
A public service for interested persons wanting information about the organisation

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
Filed electronically by topic

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Based on topics (which means functions)

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The CEO

Have you implemented an Online Library Management System within your organisation?
Are not planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 1
General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
Direct contact with heads of organisations. Remember that in our small country most of the heads of major business organisations are on a first name basis. And most operate tiny offices like us.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
CEO and/or President

Do you have a policy within your organisation around capturing and archiving emails?
Yes

What are the key components of your email policy?
Archive everything, except junk e-mail.

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Are not planning to implement
Central repository of best practices, guidelines and manuals	Are not planning to implement
Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Are not planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
Normally by personal contact and direct request. Some three years ago the government actually went as far as to create a Labour statistics advisory committee. Due to lack of direction, aim and work the committee quickly died. So most everything is on ad hoc level as things pop up. This is ongoing and not really useful to give examples. PNGCCI is constantly exchanging information on the private sector with the government.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
We have a quarterly trade file for distribution to all executives and presidents of all chambers located around PNG.
What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
This is a country of ad hoc, difficult to change the country's culture system.

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
Important information should be automatically forwarded to the organisation's executive for attention. The level of caprice or accidental omission should be minor or non-existence.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
While we have an executive staff of one or two, depending on staff movements, the organisation's corporate knowledge is actually residing in the executive members.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
Except for a small core of westernised and highly educated elite, there is a staffing problem of certain ethnic groups ability to communicate according to the needs of private sector organisations like PNGCCI.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Honorary Secretary

What are your key responsibilities? *(Please describe.)*
Reviewing staff performance, correspondences of the organisation, and ensuring with the staff the organisation of our meetings. Besides of course meeting government officials together with other executives.

How long have you been in your current position within your organisation?
3-5 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
Miscellaneous positions in two different local chambers in PNG before joining the National chamber executive. Besides being on the local chamber committees have also chaired the Infrastructure sub-committee and the Business sector sub-committee at various times.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?
The small size of our organisation makes up for apparent lack of formal Knowledgement systems. This is not so much a PNG thing but a relevance thing: not really relevant to have a better "filing system" and spending resources into developing it. Rather the issue is what do we want out of a better "filing system" if we are going to pour resources and time into it. Thanks.

Peru

1. Organisational Overview

Please state the name of your organisation.
Ministerio de Comercio Exterior y Turismo (Ministry of Foreign Trade and Tourism)

What is your organisation's mission?
It is articulador state Agent, organized, efficient and generating of confidence in private sector, that leads the action of the State in Foreign trade, Tourism and Crafts oriented to:

- 1)To optimize and to take advantage of the access conditions to international markets for national goods and services.
- 2)To promote competitiveness, decentralization, sustainability, and diversification of exports, tourist and artisan supply.
- 3) To promote international positioning of the Peru's image in its competition.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*

- Comisión para la Promoción de Exportaciones del Perú (PROMPEX)
- Ministerio de Comercio Exterior y Turismo
- Ministerio de Relaciones Exteriores (Through the commercial officials of Peru's embassies)
- Agencia de Promocion de la Inversion Privada (ProInv

How many staff do you have located onshore or within your country?
86 (only vice ministry of commerce)

How many staff do you have located offshore or overseas?
0

How many staff do you have in total?
86

How many offices do you have located onshore or within your country?
1

How many offices do you have located offshore or overseas?
0

How many offices do you have in total?
1

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*

- En Nuevos Soles (S/.)
- Recursos Ordinarios: 119,717,385
- Recursos Directamente Recaudados: 11,454,155
- Endeudamiento Externo: 7,060,000
- Donaciones y transferencias: 1,526,874

- Total: 139,758,414

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
139,758,414

What are your organisation's key performance indicators?
- Actividad/Proyecto: 00344 Negociations of international Agreements.
- Indicator: Number of international negociation documents (Documents of trade agreements, documents about negotiation rounds).
- Actividad/Proyecto: 17491 Conducción de la Política de Comercio Exterior. Indicador: Porcentaje de avance de los PENX Y PERX para el período 2003-2005

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
- Km implies suitable operation of data so that this becomes information. It aims to improve the organization productivity.
- Also, KM aids to avoid organization losses knowledge

Do you think Knowledge Management is more about organisational culture, technology, people or content?
It is a combination of them, but a order culture and efficiency helps much.

How important is knowledge in a Trade Promotion Organisation?
Somewhat important

What is the role of Knowledge Management in a Trade Promotion Organisation?
It aids to: 1) do faster analysis of different subjects. 2) Inprove capacity to make decisions related to Free Trade Agreements.

What are your organisation's current Knowledge Management issues?
One comes attacking in several fronts:
1) one comes developing a virtual library. This oriented to ordered storage so that the||consultations are highly eficient (by subjects, dates, authors, etc). This library will work via the Intranet.
2) Also, one comes||developing integration from the information available in the MINCETUR (subscribed agreements, internal studies, studies made by otheras institutions, commerce data bases,||among others)

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No, but plan to in the next 2 years

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

Do you have any Knowledge Management components within your current Information Technology strategy or programme?
No

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System?
(Please select only one.)

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Are not planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
<1 year ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*

- Department of IT and Statistics (Oficina General de Informática y Estadística)
- Enrique Garrido-Lecca, head
- Nora Tejeda, head of of Departament of IT
- Waldy Bejarano, official of Economic Searching Department (Oficina General de Estudios Economicos)

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
1) Department of IT and Statistics
2) Department of Economic Searching

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
1) requests of loans of equipment
2) E-Mail
3) Access to server
4) official notices
5) News

Does your organisation have a website?
Have implemented

I**f you have implemented a website, please list the url address(s) below.**
www.mincetur.gob.pe

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Deparment of IT

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Deparment of IT

Please list the top five things your website is used for in order of highest use to lowest use.
I) Comercio Exterior:
- 1)Pagina del TLC
- 2)PENX
- 3)PERX

II) Turismo:
- PENTUR
- INVENTARIO TURISTICO

III) Institucional: TRANSPARENCIA

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
No

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Secretaría General

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
No

If you have a physical library, is your library open to your clients, general public or just staff. (Please select all that apply.)
Staff
Clients
General Public

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Are planning to implement

Knowledge map of staff skills and expertise	Are not planning to implement
Knowledge management training and awareness	Are not planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)

Does your organisation share information with other Government agencies?
No

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
No

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?
Account manager

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

I**n your opinion, what are the most important factors for the success of a Knowledge Management initiative?**
El transmitir la información en el tiempo

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why*?* *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
La costumbre de no usar a la tecnología cmo herramienta de conocimiento

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
no tenemos una cultira del conocimiento ni compartir la información

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
el eogismo, el miedo a compartir informaicón

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
no se

What are your key responsibilities? *(Please describe.)*
no se

How long have you been in your current position within your organisation?

Have you held any other positions within your organisation?

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Russia

1. Organisational Overview

Please state the name of your organisation.
Ministry of Economic Development and Trade (MEDT of Russia)

What is your organisation's mission?
To elaborate the economic laws and to promote foreign and domestic trade, SMEs, etc.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
State Trade and Investment Agency - "InforVES" (under control of MEDT); Rostechregulation, Rospatent, Federal Customs Service (under MEDT control), Federal Antimonopoly Service, Federal Tourism Service, etc.

How many staff do you have located onshore or within your country?
1957 (only headquarters staff), not including trade representatives in 86 subjects (regions) of Russia - 346 people and 74 foreign countries- more than 1.300 people

How many staff do you have located offshore or overseas?
more than 1.600

How many staff do you have in total?
confidential information (not for public disclosure)

How many offices do you have located onshore or within your country?
86 - within the country

How many offices do you have located offshore or overseas?
74 - offshore or overseas

How many offices do you have in total?
163 (including FCS)

What are your organisation's key sources of revenue? (*Please state the revenue type and amount for each type in your local currency.)*
Federal budget, figures are not for public disclosure

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
Figures are not disclosured under the domestic law on confedential and secret information

What are your organisation's key performance indicators?
can not state the value (in Roubles or USD)

You have reached the end of Section 1. Do you have any other comments about your organisation?

Under the law MEDT is responsible for elaborating and implementing the state foreign trade policy

2. Defining Knowledge Management

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Topping

What are your organisation's current Knowledge Management issues?
Satisfactory

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
We are just working out the state policy in valuation of public executive bodies activity on its final outcome including knowledge management strategy and further its works financing from a federal budget

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No, but plan to in the next 2 years

Do you have any Knowledge Management components within your current Information Technology strategy or programme?
Yes

Please give details.
We are bringing about the "E-Russia" Federal Goal Programme, including e-government (by 2010)

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
no comment

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)*
2-3 years ago

What Document Management System product/software do you use?
Intranet and Internet software products, including "MEDT Economic Internet portal" (http://www.economy.gov.ru (in Russian)

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
One of the MEDT departments

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The MEDT department responsible for this job

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
Yes

Is saving documents into the Document Management System a manual or automatic process?
Manual AND Automatic/System Generated

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
1-2 years ago

What Client Management System product/software do you use?
MEDT Economic portal (website) in Internet, Russian Trade Representations in Foreign Countries (www.torgpredstvo.ru), The Export Opportunity of Russia (www.exporsupport.ru), Federal Customs Service Internet website, "Russia and the WTO (www.wto.ru), "Russia-China Economic Cooperation" (Internet website in Russian, Chinese and English), "e-Russia", e-IAP of Russia on APEC web-site, etc.

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
almost all (14 of 17) departments of MEDT of Russia, Federal Customs Service, Ministry of Information Technology and Telecommunications of Russia, etc.

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
appr. more than 10 MEDT departments (system of training is wide enough

Is your Client Management System accessible from both onshore and offshore?
Onshore only

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual AND Automatic/System Generated
Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
One of the MEDT departments, all other departments are responsible to update the information practically every day

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The MEDT department responsible for Intranet function

Is your Intranet accessible from both onshore and offshore?
Onshore only

Please list the top five things your Intranet is used for in order of highest use to lowest use.
internal and external communication (using secured e-mail system), exchange of confidential information, the wide sources in law drafting (legal advice system for more than 1,5 mln. of Russian laws and regulations), study of the consolidated trade

and economic information (including mass media sources), trade, investment, etc., statistics

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
see as above

When did you first implement a website?
3-5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
One of the MEDT department and MEDT press-service

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
as above

Please list the top five things your website is used for in order of highest use to lowest use.
general trade and economic information, laws drafting, trade and investment promotion, analytics, statistics, etc.

Do you have any Government record keeping requirements?
Yes

If yes, please describe your Government record keeping requirements.
secured and guarated for personal information non-disclosure

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?
our own software products

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
Both

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
One of the MEDT departments

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 1
General Public 0

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
The afore-said "Russia-China Economic Cooperation" Internet web-site

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
5 departments of MEDT

Do you have a policy within your organisation around capturing and archiving emails?
Yes

What are the key components of your email policy?
security assurance

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Have implemented
Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Have implemented

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*
information is confidential

Does your organisation share information with other Government agencies?

Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
all federal ministries, services, agencies, and also Russia's Parliament (of two chambers), and municipal executive bodies, embassies and abroad trade representations, etc.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
see: www.exportsupport.ru

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
Website, offshore office and Other is the MAIN contact point for exporters and companies

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
to promote businesses and Russian exporters

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
growth of private persons and legal entities adresses and appeals both in written and electronic (with the aid of Internet) forms

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? (*Please describe.)*
The e-Russia federal program and "Russia-China Economic Cooperation" Internet web-site

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
yes, because we intend to enlarge our "Economic portal" in Internet by means of unification of all other state sources and resource

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?
No

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
high level

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
no barriers

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
Yes

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.
Gratuity

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?
exit interviews - for internal use to reform the manpower policy

7. About the respondent

What is your job title?
Counselor, chief of APEC and ASEAN section of the Department of Foreign Economic Relations, Russia's Ministry of Economic Development and Trade (Moscow)

What are your key responsibilities? *(Please describe.)*
Responsible for economic cooperation deals with APEC, ASEAN, ESCATO, and etc. Asian regional economic and trade organisations (as a public employee)

How long have you been in your current position within your organisation?
1-2 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
senior expert, bureau deputy director, employee of the Russian Trade Representation in the Republic of Korea, before - a director of one of the firms in framework of former state-run All-Russia foreign trade company "Techmashimport" (exportation and importation of complete chemical and petrochemical plants, shops and installations)

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?
no, this system is just in transition and evolution to reach it maturity

Singapore

1. Organisational Overview

Please state the name of your organisation.
IE Singapore

What is your organisation's mission?
To help Singapore-based companies grow and internationalise successfully.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Ministry of Trade and Industry

How many staff do you have located onshore or within your country?
340

How many staff do you have located offshore or overseas?
80

How many staff do you have in total?
420

How many offices do you have located onshore or within your country?
1

How many offices do you have located offshore or overseas?
36

How many offices do you have in total?
37

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*

What are your organisation's key performance indicators?

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
The capture & processing of information and insights from all members of an organisation to enable the organisation to fulfil its mission.

Do you think Knowledge Management is more about organisational culture, technology, people or content?

Organisational culture

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
To promote the kM culture, implement effective KM system and ensure the quality of contents is of acceptable standard.

What are your organisation's current Knowledge Management issues?
How to get people to share what they know. How to get people to deposit their tacit knowledge in the KM system

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
To support our corporate Vision to be the expert agency for market intelligence, market insights and internationalisation strategies.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Senior Management

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Very widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
Difficult to determine as almost everyone is involved in our KM program.

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System?
(Please select only one.)
2-3 years ago

What Document Management System product/software do you use?
Dom.doc

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
Registry

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Registrty and IT

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
No

Is saving documents into the Document Management System a manual or automatic process?
Manual

Have you implemented a Client Management System within your organisation?
Are planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Intranet? (*Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Intranet accessible from both onshore and offshore?

Please list the top five things your Intranet is used for in order of highest use to lowest use.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.iesingapore.gov.sg

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Web Services Unit

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Please list the top five things your website is used for in order of highest use to lowest use.

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Have implemented

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? (*Please specify business unit and/or position title of the individual(s) responsible.)*

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
No

Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 1
General Public 1
Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are not planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
Yes

What are the key components of your email policy?

Central repository of research undertaken	
Central repository of presentations or documents	
Central repository of best practices, guidelines and manuals	

Knowledge map of staff skills and expertise	
Knowledge management training and awareness	
Communities of Practice	
Project debrief system to capture lessons learnt	
Social Network Analysis	

Do you have a group or team within your organisation which is responsible for undertaking research?

What are the core research databases and resources your organisation uses? (*Please list in the space provided below.)*

Does your organisation share information with other Government agencies?

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?
Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?

Do you think knowledge sharing behaviours should be rewarded?

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?

Does your organisation have a formal mentoring or coaching programme?

Is the annual turnover of staff in your organisation considered to be low, medium or high?

Does your organisation conduct exit interviews with staff that leave your organisation?

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?

What are your key responsibilities? *(Please describe.)*

How long have you been in your current position within your organisation?

Have you held any other positions within your organisation?

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Chinese Taipei

1. Organisational Overview

Please state the name of your organisation.
Taiwan External Trade Development Council

What is your organisation's mission?
we enhance trade opportunities for world-wide trading

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Bureau of Foreign Trade

How many staff do you have located onshore or within your country?
500

How many staff do you have located offshore or overseas?
50~70

How many staff do you have in total?
about 600

How many offices do you have located onshore or within your country?
7

How many offices do you have located offshore or overseas?
35

How many offices do you have in total?
42

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
We're non-profit trade promotion organization in Taiwan, jointly sponsored by the government & the industrial as well as commercial associations.

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
not sure.

What are your organisation's key performance indicators?
Market research & Information Services, Market Development, Exhibition & Convention Service, Design Promotion, Trade Education, Web Service.

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?

to experiences knowledge from various industries to develop & make business more efficient, avoid the repeatability cost.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
depends on each situation that meets, most of them concerns of KM is People.

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
assist arrange any function to enhances trade opportunities for world-wide trading.

What are your organisation's current Knowledge Management issues?
doucment management,experience sharing,collaboration.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
try to develop a non-paper working environment. shorten working process. accumulated the know-how to be practice.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Information Technology

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Quite widely known and supported

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

we expect to keep normal cost this year.

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Are planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
>5 years

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Specialist

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Specialist

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
sub system,bulletin message,division data.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
http://www.taiwantrade.com.tw
http://www.taitra.com.tw

When did you first implement a website?
2-3 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
manager.

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Trade Net Center Manager.

Please list the top five things your website is used for in order of highest use to lowest use.
world wide business trading area, trade opportunity DB, business exchange.

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?

No

Are your records predominantly paper or electronic?
Electronic

Have you implemented an electronic Records Management System within your organisation?
Are not planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
Yes

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*
base on several levels, first one is organization, include each division level, second is based on every trading event business function.

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Have you implemented an Online Library Management System within your organisation?
Have implemented

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
No

Do you have a physical library within your organisation?
Yes
If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 0
Clients 0
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are not planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
Yes

What are the key components of your email policy?
we have multiple policies, such as by indivudual markets & projects, etc.

Central repository of research undertaken	Are planning to implement
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Are planning to implement
Knowledge map of staff skills and expertise	Have implemented
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are planning to implement
Project debrief system to capture lessons learnt	Are planning to implement
Social Network Analysis	Are planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)
world wide marketing, convention services, & inform service, market development.

Does your organisation share information with other Government agencies?
No

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
TOD & CRM System.

What is the MAIN contact point within your organisation for exporters and companies?
Offshore office

Please specify
You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
support from boss & top-down forces policies,

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

we havn't finished our KM yet so far.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
it's not easy to figure out the points which obviously been improved.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
reticence, employees has it's know-how, but not a custom to share each other.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
we have no experience on how to share knowledge, espeically build a custom habbit needs time to do so.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
Yes

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.
counpon, free tickets, etc.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Medium

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Specialist

What are your key responsibilities? *(Please describe.)*
KM Project handle(IT Hardware & Software, provide functional requirement as we need.)

How long have you been in your current position within your organisation?
2-3 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
web sites management, system management, consultant of other divisions.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Thailand

1. Organisational Overview

Please state the name of your organisation.
Department of Export Promotion (DEP), Ministry of Commerce

What is your organisation's mission?
-To improve the competitive capabilities of Thai exporters of goods and services in the global market
- To promote and implement export promotion activities both domesticlly and internationally

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*

How many staff do you have located onshore or within your country?
600

How many staff do you have located offshore or overseas?
200

How many staff do you have in total?
800

How many offices do you have located onshore or within your country?
7 (including in Bangkok and Nontaburi which are headquater)

How many offices do you have located offshore or overseas?
53

How many offices do you have in total?
60

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
*G*overnment budget

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*

What are your organisation's key performance indicators?
Export value and export growth rate, number of active exporters, number of participants in each DEP's activity, rate of satisfaction, number of newly-born exporters

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
It will enhance the TPOs capabilities on trade advisory and consultancy.

What are your organisation's current Knowledge Management issues?
There is specific channel or route to follow.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?
DEP has collected data, gathered information, and analyzed it regularly. However, when talking about "Knowledge Management", the term is quite new for us. So, the difficult part in filling up this questionnaire is the correct understanding of the term and collaborate it to the work and culture of DEP.

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No

Do you have any Knowledge Management components within your Information Technology strategy or programme?
Yes

Please give details.
Each office both in Thailand and overseas has to add the report of trade situation and other related information to the Intranet directly. By doing so, each office has its own password. The information will be shared within the organization as well as the public.

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?
DEP should eccourage its staffs the awareness of how important it is and how it will help DEP perform more efficiently if the programme is appropriately formulated.

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Have implemented

When did you first implement a Document Management System? *(Please select only one.)*
1-2 years ago

What Document Management System product/software do you use?
Web Application (ASP, PHP)

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)
International Trade Information Center

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
International Trade Information Center

Is your Document Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save documents into the Document Management System?
No

Is saving documents into the Document Management System a manual or automatic process?

Manual

Have you implemented a Client Management System within your organisation?
Are planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
2-3 years ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
International Trade Information Center

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
International Trade Information Center

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
- Repoer system
- Document flow
- Department Operation Center (classified information for the executives)
- Trade statistics
- Internal application for internal use (database access application)

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.depthai.go.th

www.thaitrade.com

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
International Trade Information Center (ITIC)

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
International Trade Information Center (ITIC)

Please list the top five things your website is used for in order of highest use to lowest use.
1. Exporter List
2. Importer List
3. Trade Report
4. trade Statistics
5. Knowledge Base for Exporters

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
No

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Do you have a physical library within your organisation?

Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 1
Clients 1
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Are not planning to implement
Central repository of best practices, guidelines and manuals	Are not planning to implement
Knowledge map of staff skills and expertise	Are planning to implement
Knowledge management training and awareness	Are planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses? *(Please list in the space provided below.)*

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
List of exporters and export information for all government agencies

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
Business Matching Application

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?
Website and Call Centre MAIN contact. Trade Information Link used for collaboration.

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?
It will create awareness of cooperation from all levels of the organization.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
Scattering and not fully utilized.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
There is no barriers, only that we have to systemize how to share knowledge in our organization.

Do you think knowledge sharing behaviours should be rewarded?
No

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Director of International Cooperation Group

What are your key responsibilities? *(Please describe.)*
The cooperation between DEP and international TPOs and other international fora such as ATPF, APEC, BIMSTEC, etc.

How long have you been in your current position within your organisation?
<1 year

Have you held any other positions within your organisation?
No

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

United States

1. Organisational Overview

Please state the name of your organisation.
US Department of Commerce, Commercial Service

What is your organisation's mission?
We assist US exporters in selling their products overseas.

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
They are many and numerous: many states have their own trade promotion programs; many ports have programs; SBA runs its Small Business Development Centers; the World Trade Centers have programs.

How many staff do you have located onshore or within your country?
400

How many staff do you have located offshore or overseas?
1300

How many staff do you have in total?
1700

How many offices do you have located onshore or within your country?
96

How many offices do you have located offshore or overseas?
150

How many offices do you have in total?
246

What are your organisation's key sources of revenue? *(Please state the revenue type and amount for each type in your local currency.)*
USG funding from taxpayer revenue.

What is the total operating budget of your organisation*?* *(Please state amount in your local currency.)*
Unknown

What are your organisation's key performance indicators?
1) # of export successes
2) # of new partnerships
3) # of new clients assisted
4) # of first time exporters entering new markets
5) Customer Satisfaction with products and services
6) # of new subscribers using e-services

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
For us, knowledge management is both using technology to improve information flow, but also changing how our people do their jobs and the culture in our organization.

Do you think Knowledge Management is more about organisational culture, technology, people or content?
Every one of those elements has been critical to us. We have focused on bringing the right technology to our people while at the same time developing programs to help them deepen and expand their knowledge. We have also changed our performance measures system (to allow more than one person to get credit for an export success) in order to help change the culture of the organization and get people to share more. We have also focused on bringng new content to users(such as databases and subscriptions) that was not previously available.

How important is knowledge in a Trade Promotion Organisation?
Very important

What is the role of Knowledge Management in a Trade Promotion Organisation?
Getting widely dispersed knowledge (across the US and the world) to the finger tips of our Specialists working with clients to help them solve their exporting problems. To encourage our people to specialize more, and move away from being an organization of generalists. To enable our organization to provide deeper and more comprehensive solutions to our clients, so they come back to us and refer new clients to us.

What are your organisation's current Knowledge Management issues?
People are afraid to share what they don't know by asking questions. They are also afraid of new technology, feeling that if they share, they might be replaced. They are also, quite frankly, very lazy at times, not wanting to take time to share for the greater good. We have to work to reward and recognize people who share what they know.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
Yes

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
Yes

Do you have any Knowledge Management components within your Information Technology strategy or programme?

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?
The main impetus behind knowledge management was simply to improve the level of service we offer exporters. We realize that the internet and technology have vastly improved the type and availability of exporting information your average business person can access. We cannot compete with that. We are seeking to specialize more and be in a position to offere deeper and more comprehenisive solutions to clients.

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?
Senior Management

Is your Knowledge Management strategy or programme widely known and supported within your organisation?
Quite widely known and supported
What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)
Less than 5% of our operating budget.

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
Yes

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement

When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System?
(Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Have implemented

When did you first implement a Client Management System?
>5 years ago

What Client Management System product/software do you use?
We use a Lotus Notes system customized for us. We will be buying an off the shelf solution shortly.

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The Office of the Chief Information Officer.

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The Office of the Chief Information Officer will work with the IT staff from the domestic field and the overseas field to develop and implement a training strategy.

Is your Client Management System accessible from both onshore and offshore?
Onshore AND offshore

Is it mandatory for staff to save information into the Client Management System?
Yes

Is saving information into the Client Management System a manual or automatic process?
Manual

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
3-5 years ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The Office of the Chief Information Officer.
Who has responsibility for training staff on how to use the Intranet? (Please specify business unit and/or position title of the individual(s) responsible.) A three person group does all the worldwide training on the intranet.

I**s your Intranet accessible from both onshore and offshore?**

Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.

- Accessing and uploading our market research.
- Storing some guides and manuals for each unit or initiative.
- Accessing and editing performance measures reportables.
- Storing and accessing commonly used forms.
- General announcements.

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.buyusa.gov
www.export.gov

When did you first implement a website?
>5 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
The Office of the Chief Information Officer.

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
A three person group is responsible for this training. They are in our professional development unit but focused on IT Tools & Training.

Please list the top five things your website is used for in order of highest use to lowest use.
1) To help exporters find local assistance and contacts in their state and city.
2) To promote local office events, such as seminars and visits by overseas specialists.
3) To promote Commercial Service trade events in the U.S. or overseas.
4) To promote our products and services to clients.
5) To share country specific exporting information.

Do you have any Government record keeping requirements?
Yes
If yes, please describe your Government record keeping requirements.
Sorry, I am not familiar with them. But they do exist.

Do you have a Records Management policy?
Yes

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
This is done by another unit and I am not that familiar with their policies or practices.

Have you implemented an Online Library Management System within your organisation?
Are not planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

D**o you have a physical library within your organisation?**
No

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff
Clients
General Public

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Have implemented

Please describe each collaborative tool and its core function.
We use a knowledge management tool (expertise management) designed by Askme Corporation. It allows us to capture and reuse questions and answers, upload any kind of file for sharing, and collaborate in community spaces.

Who has responsibility for managing collaborative tools within your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*
This is currently managed outside the OCIO's office and outside the IT office by a Program Manager that reports to the senior management champion of the project.

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Are not planning to implement
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Have implemented

Knowledge management training and awareness	Have implemented
Communities of Practice	Have implemented
Project debrief system to capture lessons learnt	Are not planning to implement
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
No

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)
Harris Selectory; Kompass; Managing Exports and Imports; BNA Reference Manual.

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
We are co-located with the Small Business Administration, Exim Bank's city/state representative program, and the Bureau of Information and Security. We share client lists, and we tap each of these organization's to provide counseling to client on export financing options, terms of payment, and export licensing issues and rules.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
Yes

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.
Trade leads are on our www.export.gov website. In the next few months, clients will be able to sign up for trade lead alerts from this website. Trade leads are also pushed to our knowledge management tool and delivered internally to domestic field specialists by industry code subscriptions. These specialists then forward relevant leads to their clients.

What is the MAIN contact point within your organisation for exporters and companies?
Account manager

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
Yes

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

- Synching collaboration and the sharing of information with how people get measured.
- Aligning other organizational program improvements to the strategy.
- Reward and recognize people that share and collaborate.
- The right technology for your organization.
- Communicating that this is a culture change and will take time (as in years).
- Senior management champion is critical. This can't be an IT tool alone.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*
Our domestic field specialists have been the early adopters of knowledge management because they are "closer to the client." So KM has been more successful in the U.S. as opposed to overseas.

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

- The rollout of our tool has been much more challening overseas for a number of reasons:|
- Widely dispered nature--150 offices in 85 countries.
- Use scenarias are less clear for the overseas specialists.
- Communication has been challenging across the management chain (the domestic field and overseas fields have different senior managers.
- Our senior manager champion of the project is from the domestic side of the organization. There is not senior management champion on the overseas side of the organization.

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*
The resistance we have experienced comes in a number of forms.
1. People have resisted the new technology because it is new and it intimates some people.
2. Others resist the culture change toward sharing, believing that they will be replaced if they share all their information on the tool.
3. Some of our overseas folks believe that this initiative is for the domestic side of the organization and that it doesn't benefit them as well.

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
We have a small core of early adopters who get it. Many in our organization see us as either a "service provider" or a "sales organization," as opposed to a knowlege based organization. We will have to work to change the way people think about what they do. We have chosen a "carrot" approach to KM rather than the "stick" because we believe that long term results will be better if we don't force people to do something that should eventually make good sense to them.

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
Our overseas staff and our domestic staff frequently have different priorities. For example, the domestic staff believe client service is number one. The overseas staff have many other priorities given that they are frequently situation in the embassy or consulate. This sometimes pulls us out of synch with each other

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
No

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
Yes

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.
Financial rewards (small).
Public recognition in a monthly newsletter.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
Sometimes

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Program Manager

What are your key responsibilities? *(Please describe.)*
Knowledge Management
The Specialists Program

H**ow long have you been in your current position within your organisation?**
2-3 years

Have you held any other positions within your organisation?
Yes

If you have held other positions within your organisation please list below.
I previously worked with exporters like my colleagues do now. So I have an understanding of their needs, their job, their typical behaviors, and I have many long-term relationships across the organization.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

Vietnam

1. Organisational Overview

Please state the name of your organisation.
Vietnam Trade Promotion Agency (Vietrade)

What is your organisation's mission?
Vietrade is a governmental organization responsible for state management, coordination and implementation of trade and trade-related investment promotion activities in Vietnam |Vietrade works together with various provincial trade promotion centers and trade support institutions as well as international and foreign trade promotion organizations to assist Vietnamese and foreign enterprises in their business development and expansion

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? *(Please state below.)*
Vietnam Chamber of Commerce and Industry

How many staff do you have located onshore or within your country?
About over 60

How many staff do you have located offshore or overseas?
4

How many staff do you have in total?
About 70

How many offices do you have located onshore or within your country?
2

How many offices do you have located offshore or overseas?
2

How many offices do you have in total?
4

What are your organisation's key sources of revenue? (Please state the revenue type and amount for each type in your local currency.)
From the government

What is the total operating budget of your organisation? *(Please state amount in your local currency.)*
About USD 400,000

What are your organisation's key performance indicators?
No indicator

You have reached the end of Section 1. Do you have any other comments about your organisation?

2. Defining Knowledge Management

How would you define Knowledge Management?
Knowledge Mangagement consists of both Management of Information and Management of People

Do you think Knowledge Management is more about organisational culture, technology, people or content?
In my opinion, Knowledge Management is more about organisational culture

How important is knowledge in a Trade Promotion Organisation?
Somewhat important

What is the role of Knowledge Management in a Trade Promotion Organisation?
It promotes trade promotion activities as well as in information providing

What are your organisation's current Knowledge Management issues?
We haven't had a specific Knowledge Management strategy yet.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?
No

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

3. Knowledge Management Strategies

Does your organisation have a Knowledge Management strategy or programme?
No, but plan to in the next 2 years

Do you have any Knowledge Management components within your current Information Technology strategy or programme?
No

Please give details.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget?

Do you expect this to increase, decrease or remain the same as this year?
(Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?
No

You have reached the end of Section 3. Do you have any other comments about Knowledge Management strategies?

4. Knowledge Management Technologies and Initiatives

Have you implemented a Document Management System within your organisation?
Are planning to implement
When did you first implement a Document Management System? *(Please select only one.)*

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Document Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Document Management System accessible from both onshore and offshore?

Is it mandatory for staff to save documents into the Document Management System?

Is saving documents into the Document Management System a manual or automatic process?

Have you implemented a Client Management System within your organisation?
Are planning to implement

When did you first implement a Client Management System?

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Who has responsibility for training staff on how to use the Client Management System? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Is your Client Management System accessible from both onshore and offshore?

Is it mandatory for staff to save information into the Client Management System?

Is saving information into the Client Management System a manual or automatic process?

Have you implemented an Intranet within your organisation?
Have implemented

When did you first implement an Intranet?
2-3 years ago

Who has responsibility for managing the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Mr. Pham Viet Duc, an expert in Information and E-commerce Dept.

Who has responsibility for training staff on how to use the Intranet? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Mr. Pham Viet Duc, an expert in Information and E-commerce Dept.

Is your Intranet accessible from both onshore and offshore?
Onshore AND offshore

Please list the top five things your Intranet is used for in order of highest use to lowest use.
- Exchanging documents and information
- Announcing jobs
- Sending mails
- Connecting with Internet
- Looking up information

Does your organisation have a website?
Have implemented

If you have implemented a website, please list the url address(s) below.
www.vietrade.gov.vn

When did you first implement a website?
2-3 years ago

Who has responsibility for managing the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Mr. Pham Viet Duc, an expert in Information and E-commerce Dept.

Who has responsibility for training staff on how to use the website? *(Please specify business unit and/or position title of the individual(s) responsible.)*
Mr. Pham Viet Duc, an expert in Information and E-commerce Dept.

Please list the top five things your website is used for in order of highest use to lowest use.
- Posting trade information, information on export markets and categories
- Introducing business opportunities
- Business directories
- Vietrade's activities
- Legal documents on trade

Do you have any Government record keeping requirements?
No

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?
No

Are your records predominantly paper or electronic?
Paper

Have you implemented an electronic Records Management System within your organisation?
Are not planning to implement

What Records Management System product/software do you use?

Do you have a File Classification System?
No

If you have a File Classification System, is it based on a functional or organisational structure? *(Please describe.)*

Who has responsibility for Records Management in your organisation? *(Please specify business unit and/or position title of the individual(s) responsible.)*

Have you implemented an Online Library Management System within your organisation?
Are planning to implement

If you have implemented an Online Library Management System, does this include material held in your offshore offices?
Do you have a physical library within your organisation?
Yes

If you have a physical library, is your library open to your clients, general public or just staff. *(Please select all that apply.)*
Staff 0
Clients 0
General Public 1

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?
Are not planning to implement

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? (*Please specify business unit and/or position title of the individual(s) responsible.)*

Do you have a policy within your organisation around capturing and archiving emails?
No

What are the key components of your email policy?

Central repository of research undertaken	Have implemented
Central repository of presentations or documents	Have implemented
Central repository of best practices, guidelines and manuals	Have implemented
Knowledge map of staff skills and expertise	Have implemented
Knowledge management training and awareness	Are not planning to implement
Communities of Practice	Are not planning to implement
Project debrief system to capture lessons learnt	Have implemented
Social Network Analysis	Are not planning to implement

Do you have a group or team within your organisation which is responsible for undertaking research?
Yes

What are the core research databases and resources your organisation uses?
(Please list in the space provided below.)
- Government agencies
- ITC
- CBI
- search on the Internet
- Domestic newspaper and magazines

Does your organisation share information with other Government agencies?
Yes

If yes, please list the Government agencies your organisation shares information with and the type of information shared.
- Other ministries, provincial trade promotion organisations
- all information that are available

Do you have an automatic system for capturing and forwarding trade opportunities to companies?
No

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?
Website

Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

5. Measuring Knowledge Management Initiatives

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?
No

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL initative and why? *(Please describe.)*

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL initative and why? *(Please describe.)*

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? *(Please describe.)*

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

6. Knowledge Management Behaviours

How would you describe the knowledge culture in your organisation?
In my opinion, the knowledge culture in my organisation is rather good

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?
No.

Do you think knowledge sharing behaviours should be rewarded?
Yes

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?
Yes

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?
No

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction programme?
No

Does your organisation have a formal mentoring or coaching programme?
No

Is the annual turnover of staff in your organisation considered to be low, medium or high?
Low

Does your organisation conduct exit interviews with staff that leave your organisation?
No

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

7. About the respondent

What is your job title?
Expert in Information & E-commerce Dept

What are your key responsibilities? *(Please describe.)*
- Providing information on European markets
- Editing content of some publications of Vietrade
- Updating information on the website of Vietrade
- Providing enterprises with business opportunities

How long have you been in your current position within your organisation?
<1 year

Have you held any other positions within your organisation?
No

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

KNOWLEDGE MANAGEMENT STRATEGIES AND STRUCTURES

Defining Knowledge Management

The term 'Knowledge Management' can be interpreted in a variety of ways. Most participants were familiar with the term Knowledge Management. For others, however, taking part in this survey was the first time they had come in contact with the term Knowledge Management, even though they had implemented Knowledge Management type initiatives.

Karl-Erik Sveiby, a noted Knowledge Management expert, has identified two 'tracks' of Knowledge Management:

- Management of Information: For researchers in this track, knowledge consists of objects that can be identified and handled in information systems.

- Management of People: For researchers and practitioners in this track, knowledge consists of processes, a complex set of dynamic skills, know-how and so on, which are constantly changing.

Definitions of Knowledge Management given by participants included:

> *Knowledge Management is a continuum of Information Management. Knowledge Management is about facilitating the maximum sharing and leveraging of the knowledge and insights of people in terms of a strategy program or result. It means sharing the tacit/implicit knowledge in the minds of individuals from diverse backgrounds and experiences. (Canada)*
>
> *Is the management of data, information, know-how and expertise available in the organization, in order to support efficiently the making decision process and planning in the organization. (Chile)*
>
> *Knowledge management is what a person or an organization does with his or its knowledge. It exists all the time irrespective of its awareness by its managers. What is of concern here is human intellectual curiosity of how to be a better and more efficient manager of knowledge than previously done especially in the light of latest technology development. Such deliberate efforts as to improve KM are what is discussed about and the reason to raise the issue in the first place. (China)*
>
> *The management of the sharing of information, ideas by means of technology; human resources mgt; and communication channel, in order to maximise efficiency. (Hong Kong)*
>
> *To enhance organization's responding ability through share information, knowledge, experience and challenge. It would enable advanced information and service offering to the customer and bring their better satisfaction. (Japan)*

The capture & processing of information and insights from all members of an organisation to enable the organisation to fulfil its mission. (Singapore)

For us, knowledge management is both using technology to improve information flow, but also changing how our people do their jobs and the culture in our organization. (US)

Knowledge Management consists of both Management of Information and Management of People. (Vietnam)

Knowledge management is a professional discipline, that utilises a mix of technological and social network skills, to better document, capture and utilise sources of knowledge existing within an organisations. (New Zealand)

Knowledge Management is that managing the knowledge based on the corporation core competency so that maximizing the capability of business and human resources. (Korea)

To experiences knowledge from various industries to develop & make business more efficient, avoid the repeatability cost. (Taiwan)

Km implies suitable operation of data so that this becomes information. It aims to improve the organization productivity. Also, KM aids to avoid organization losses knowledge. (Peru)

Knowledge Management could be defined as the skills and information that the person possess in order to develop its function. In terms of Bancomext the organisation has been very concerned with selected employees appropriate to the function that they develop. Why because in the economy it is the only institution responsible to promote the foreign trade of Mexico therefore the persons that are promoting the foreign trades of Mexico should have the qualifications required to develop the job. The organisation has implemented things that have more than 70 years particular programme that all employees have to align their activities to their goals of the institution. So all employees and divisions have to redefine their functions, their roles, their activities in order to be aligned to their objectives and goals of the institution. (Mexico)

When asked if participants thought that Knowledge Management was more about organisational culture, technology, people or content, most thought that it was a balance of all of these characteristics. Some thought it was more about organisational culture.

A balance of each of these. (Australia)

All of them, but the people and technology are the most relevant. (Chile)

Organizational culture, but which is not standing alone from the general practice on KM by the society as a whole it operates in. If KM is very much developed in the home culture of the organization, the atmosphere for better KM practice goes without saying much advanced in comparison with its counterparts in other countries. Technology is always available, but it does not mean people would necessarily buy it, does it? People are social animals, who would follow their culture to fit the best way they could. Content is

intended dynamic and interactive for its usefulness, for which what KM is aimed to make it possible. (China)

The management of the sharing of information, ideas by means of technology; human resources mgt; and communication channel, in order to maximise efficiency. (Hong Kong)

Organisational culture. (Japan)

Organisational culture. (Singapore)

Every one of those elements has been critical to us. We have focused on bringing the right technology to our people while at the same time developing programs to help them deepen and expand their knowledge. We have also changed our performance measures system (to allow more than one person to get credit for an export success) in order to help change the culture of the organization and get people to share more. We have also focused on bringng new content to users(such as databases and subscriptions) that was not previously available. (US)

In my opinion, Knowledge Management is more about organisational culture. (Vietnam)

It is certainly a mix of technology and organiational culture - KM is more appropriate in large organisations, especially those where knowledge needs to be transferred across boundaries. (New Zealand)

More about content and organisational culture. (Korea)

Depends on each situation that meets, most of them concerns of KM is People. (Taiwan)

It is a combination of them, but a order culture and efficiency helps much. (Peru)

I believe that it is more about the organisational culture. (Mexico)

Overview

Whatever the interpretation or definition of Knowledge Management, when asked how important knowledge is in a TPO, 79.0% of participants answered 'Very Important'.

How important is knowledge in a Trade Promotion Organisation?

Answer	Number	% of Total
Very important	15	79.0%
Somewhat important	3	15.8%
Not very important	0	0.0%
Not at all important	0	0.0%
Don't know	1	5.3%

Participants were asked about the role of Knowledge Management within a TPO. The following responses were received:

To support the attainment of corporate objectives. KM should enhance the organisation's performance through more effective use of knowledge and information. (Australia)

Facilitate sharing/re-use of information/knowledge. (Canada)

The goal of the TPO is to provide not only information, orientation and logistic support to their clients (exports or local companies), but to provide "knowledge" (understood like a service with a real added value). Therefore, the knowledge management is critical to achieve this. (Chile)

A core factor to success. (China)

TPO always serves a large variety of customers, objectives and markets; hence demands wide range of info. Good knowledge mgt is there esential and could improve efficiency. (Hong Kong)

Effective business operation, smooth communication among domestic/overseas network and homogenization of customer services. (Japan)

To promote the KM culture, implement effective KM system and ensure the quality of contents is of acceptable standard. (Singapore)

Getting widely dispersed knowledge (across the US and the world) to the finger tips of our Specialists working with clients to help them solve their exporting problems. To encourage our people to specialize more, and move away from being an organization of generalists. To enable our organization to provide deeper and more comprehensive solutions to our clients, so they come back to us and refer new clients to us. (US)

It promotes trade promotion activities as well as in information providing. (Vietnam)

Two roles are 1. Harnessing existing knowledge to improve the efficiency of the TPO, and 2. Transferring knowledge to allies and companies who can use and build on this knowledge to their own firm's competitive advantage. (New Zealand)

Enhancing productivity and efficiency by boosting the reuse of knowledge. Strengthening the capability of human resources. Implementation of learning organization. (Korea)

Assist arrange any function to enhances trade opportunities for world-wide trading. (Taiwan)

It aids to: 1) do faster analysis of different subjects. 2) Inprove capacity to make decisions related to Free Trade Agreements. (Peru)

Inspiring and enhancing the people managing the organisation. (Indonesia)

How they can use matters such as queries and direct them to relevant companies/people so that they can trade. Also to be aware of what is on offer and market it within their budget to likely markets. (Papua New Guinea)

It will enhance the TPOs capabilities on trade advisory and consultancy. (Thailand)

Monitoring market opportunities, matching the right skills with the right projects. (Brunei)

Despite a general awareness of Knowledge Management, just over 50% of participants have a Knowledge Management strategy, while 21.1% plan to develop a strategy within the next two years.

Does your organisation have a Knowledge Management strategy or programme?

Answer	Number	% of Total
Yes	10	52.6%
No	4	21.1%
No, but plan to in the next 2 years	4	21.1%
No, do not plan to	0	0.0%
Unsure	1	5.3%

Participants who stated that their organisation has a Knowledge Management strategy gave the following reasons why one had been established:

Because Austrade provides advice to clients, which is based on sound knowledge and information. Therefore KM (management of both knowledge and information) is core to our success. (Australia)

Increasing volume of electronic information and e-mail. We needed new policies, practices, tools and support to help employees cope with increasing volumes of electronic information crossing their desktops on a day to day basis. (Canada)

Because ProChile is and organisation with 30 years and is necessary to improve and to adapt the services and support for their clients updated requirements that include an important demand for more valuable, complex and sophisticated services an support. (Chile)

For more effective business operation, and improved customer services. (Japan)

To support our corporate Vision to be the expert agency for market intelligence, market insights and internationalisation strategies. (Singapore)

The main impetus behind knowledge management was simply to improve the level of service we offer exporters. We realize that the internet and technology have vastly improved the type and availability of exporting information your average business person can access. We cannot compete with that. We are seeking to specialize more and be in a position to offer deeper and more comprehensive solutions to clients. (US)

It resulted from a major KM study conducted by KPMG four years ago. There was a realisation that we needed to be more efficient in our processes generally, and better KM was regarded as a possible solution. (New Zealand)

The reason is that we wanted to enhance the organization's productivity and capability by facilitating accumulation and share of knowledge. (Korea)

Try to develop a non-paper working environment. Shorten working process. Accumulated the know-how to be practice. (Taiwan)

The term 'Knowledge Management' appeared in official documentation within nine (47.4%) organisations.

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?

Answer	Number	% of Total
Yes	9	47.4%
No	10	52.6%

Participants were also asked what their organisation's current Knowledge Management issues were.

1. Implementation of strategy. 2. "KM" has negative connotations - therefore finding a way to implement program with greater enthusiasm and buy-in from staff. (Australia)

IM is well defined. KM is still in its infancy and requires a formal strategy, program and plans. (Canada)

To go ahead with the system integration and "conversation" (technically and conceptually). Capacitation and training. Priorization of products, markets, services and instrument, and focusing. (Chile)

Rewards to better KM methods and practice. (China)

Ways and pace to enhance employees' market and job knowledge in order to adapt to markets development. (Hong Kong)

How to get people to share what they know. How to get people to deposit their tacit knowledge in the KM system. (Singapore)

People are afraid to share what they don't know by asking questions. They are also afraid of new technology, feeling that if they share, they might be replaced. They are also, quite frankly, very lazy at times, not wanting to take time to share for the greater good. We have to work to reward and recognize people who share what they know. (US)

We haven't had a specific Knowledge Management strategy yet. (Vietnam)

KM has been in a way pigeon-holed and there is a not a realisation that KM solutions are appropriate for other parts of the organisation. (New Zealand)

How to support the organization new vision. How to accumulate best practices more efficiently. How to enhance the value of knowledge. How to implement Knowledge Management System more focused on customers. (Korea)

Document management, experience sharing, collaboration. (Taiwan)

Knowledge Management in our organisation. The institution is involved in a whole programme that is in place in the institution in order to find out what are the functions that each area/division/individual have to develop in order to accomplish its role. Therefore I believe that KM is very crucial in order to get the goals that this programme in particular has been pursuing. We call it continuous improvement programme. Quality and continuous improvement programme. (Mexico)

We are a private sector organisation. Constantly challenged to present to government private sector realities that enable our members to compete on a level playing field. (Papua New Guinea)

Lack of capabilities and skills. (Brunei)

Of those participants that stated they had a Knowledge Management strategy, just over half (52.6%) had a dedicated group or team responsible for implementing Knowledge Management initiatives.

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?

Answer	Number	% of Total
Yes	10	52.6%
No	9	47.4%

Case Study – Korea

BACKGROUND

KOTRA's Knowledge Management strategy focuses on full organisation-wide integration and is considered to be very widely known and supported within KOTRA.

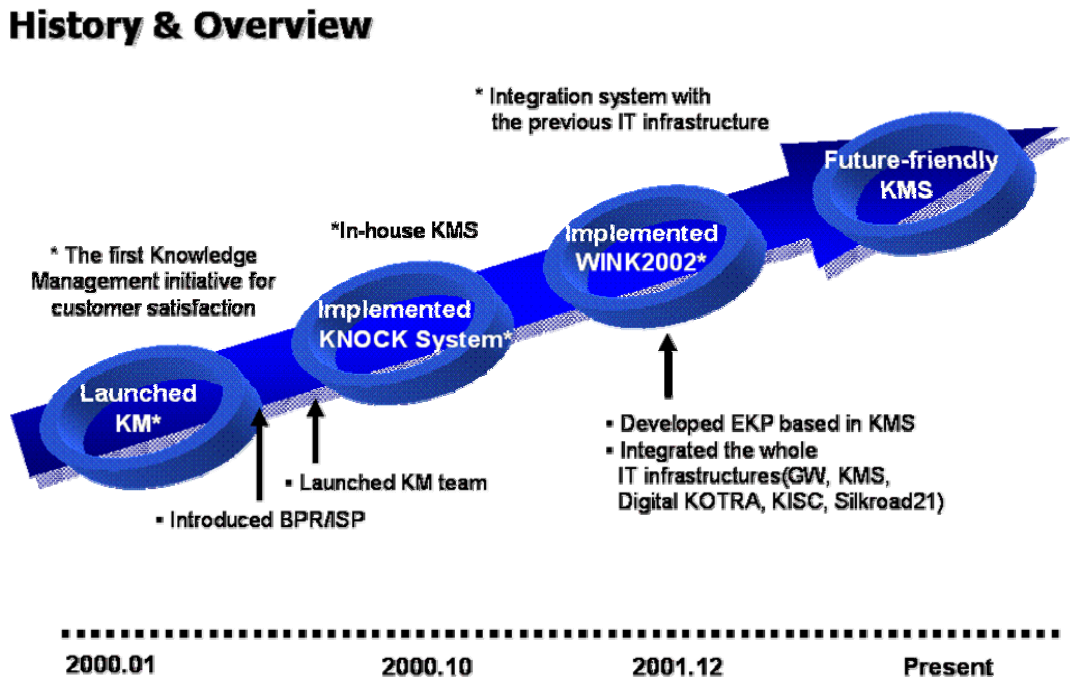
KOTRA sees the role of knowledge to be:

> *Enhancing productivity and efficiency by boosting the reuse of knowledge. Strengthening the capability of human resources. Implementation of learning organization.*

The following reason was given for establishing a Knowledge Management strategy:

> *The reason is that we wanted to enhance the organization's productivity and capability by facilitating accumulation and share of knowledge.*

The history of Knowledge Management within KOTRA, begun in 2001, is depicted in the following diagram:



WINK (Worldwide IntraNet of KOTRA)
EKP (Enterprise Knowledge Portal)
KMS (Knowledge Management System)
KNOCK previous version of WINK

KEY FEATURES

KOTRA's current knowledge issues include:

How to support the organisations new vision. How to accumulate best practices more efficiently. How to enhance the value of knowledge. How to implement Knowledge Management System more focused on customers.

Staff involved in Knowledge Management are dispersed throughout KOTRA. Knowledge Management roles are clearly defined and led by the chief knowledge officer. While there isn't a stand alone Knowledge Management team, Knowledge Management work has been transferred to many divisions throughout KOTRA. Staff with key Knowledge Management roles come together in a virtual team.

Overview of people involved in KM

Employee	Role and Mission
CKO	In charge of comprehensive management related to KM
Planning & Coordination Department	Redesigns, improves the organisation and manages details
HR Team	Plans evaluation, compensation bill, and manages CDP
General Affairs Team	Manages CoP
CS Management Team	Boosts customer satisfaction
e-KOTRA Team	Develops and maintains the KMS, information system etc
Knowledge Manager	Approves or returns knowledge (assesses the value of knowledge)

REFLECTIONS

Integration

KOTRA's Knowledge Management strategy is not new: it has been embedded within the organisation for at least five years. KOTRA has focused on integration, providing a single point of entry into its knowledge base.

Virtual Team

By dispersing Knowledge Management staff throughout the organisation, KOTRA ensures there are strong advocates supporting the Knowledge Management strategy organisation-wide. This also ensures that any issues arising from the implementation of the strategy are captured 'on the ground' and fed back to the virtual team.

The structure of the virtual team ensures that there are clear responsibilities and accountabilities amongst team members. KOTRA believes a critical inclusion within the virtual team is Human Resources, as it sees Human Resource strategies, policies and procedures as critical levers in bringing about change in the culture of the organisation and in individual behaviours.

Case Study – Canada

BACKGROUND

Principles
The Department of Foreign Affairs & International Trade Canada (DFAIT) has followed the Government of Canada policy in giving individual officers in the organisation some accountability for Information Management. Facilitating Knowledge Management through effective Information Management is a paramount objective. The key principles of Information Management in the organisation are:

- All staff are custodians of information and responsible for management of information under their control
- Electronic systems are favoured for creating, using and managing information
- Security classification and access control is important
- Optimal sharing and reuse of information is encouraged

Guidelines
General policy on Information Management is governed by the policy requirements issued by the Treasury Board of Canada. These state that government institutions should:

a. Manage information to facilitate equality of access and promote public trust, optimise information sharing and reuse, and reduce duplication, in accordance with legal and policy obligations
b. Ensure that information created, acquired, or maintained to meet programme, policy, and accountability requirements is relevant, reliable, and complete
c. Limit the collection, use, and disclosure of personal information to the minimum required to conduct a programme or service, in accordance with the Privacy Act
d. Manage information in a manner that supports the provision of services and information in both official languages, in accordance with the Official Languages Act
e. Manage information, regardless of its medium or format, to ensure its authenticity, accuracy, integrity, clarity, and completeness for as long as it is required by the National Archives of Canada Act, National Library of Canada Act, Access to Information Act, specific departmental statutes, and other laws and policies
f. Document decisions and decision-making processes throughout the evolution of policies, programmes, and service delivery
g. Implement governance and accountability structures for the management of information, including during collaborative service delivery arrangements or when information is shared with other federal government institutions, other Governments, or non-governmental organisations
h. Use electronic systems as the preferred means of creating, using, and managing information
i. Protect essential records to ensure the continuity of key services and business operations

j. Preserve information of enduring value to the Government of Canada and to Canadians
k. Dispose of information no longer required for operational purposes in a timely fashion
l. Foster supportive environments for information management and ensure that employees meet their responsibilities for managing information
m. Assess the effectiveness and efficiency of the management of information throughout its life cycle

Further details are available from the web site of the Treasury Board: http://www.tbs-sct.gc.ca/ip-pi/im-gi/im-gi_e.asp

KEY FEATURES

Internal Information

Within the departments, the main tools for Knowledge Management are the corporate Intranet, and InfoBank (InfoBank is reported on separately).

Staff training as part of the Information Management revitalisation strategy has concentrated on InfoBank, as it is a new advanced Information Management system. At the same time, staff are reminded of their overall obligations as individuals to save key information into the knowledge repository.

Considerable emphasis is put on the difference between information that is of 'Enduring Value', and information that is of 'Transitory Value'. A useful bilingual sheet is available for all staff, which explains in a straightforward way the differences between the two types of information, and reminds staff of the key Information Management principles of the departments. Enduring information is saved in a separate repository (equally available to staff) in order to facilitate life cycle management. Transitory information remains under the control of the author/custodian.

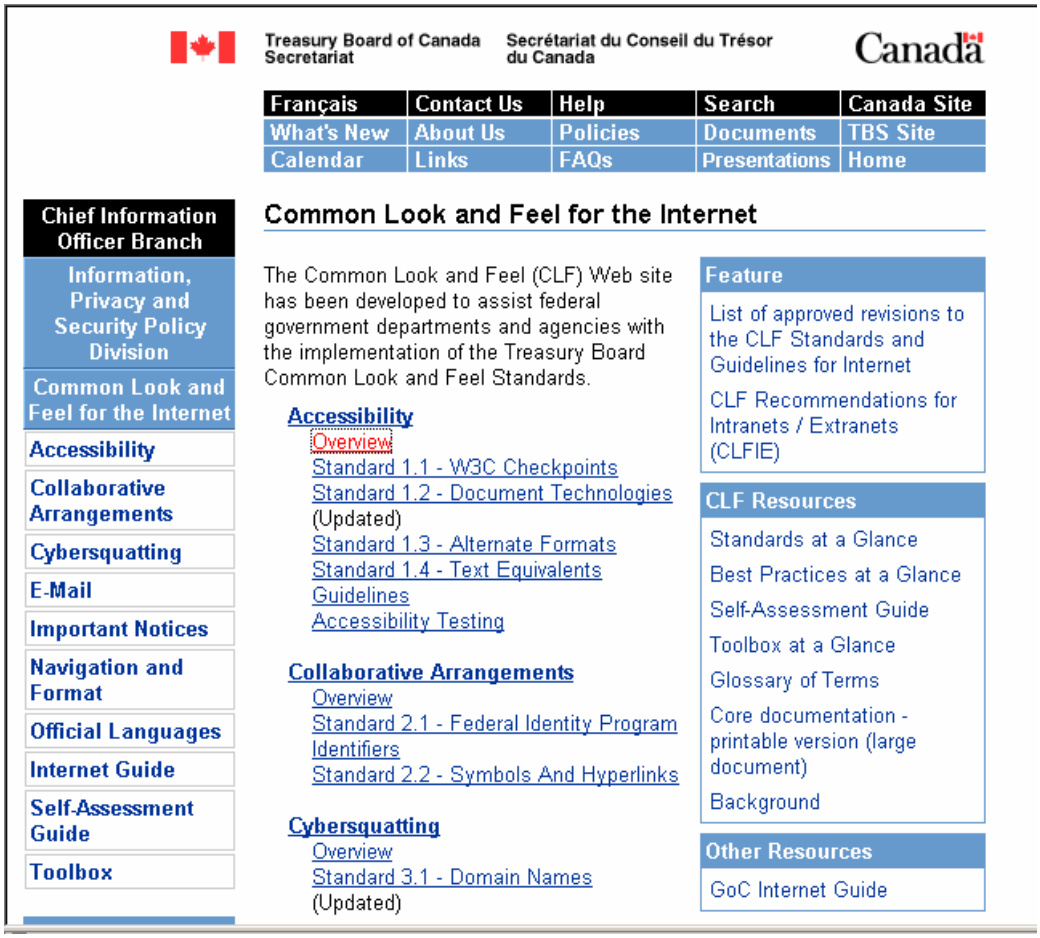
Information for the Public

There is considerable emphasis on Knowledge Management in Canadian government organisations. Knowledge Management has been a high priority for the Canadian Government, with its Government On Line strategy aimed at making Canada the most connected country in information technology by 2004 (http://www.gol-ged.gc.ca/index_e.asp). Departments have had to look carefully at their own information, and establish exactly what is public information that can be shared, and what is confidential information that should stay in the organisation. Due to the confidential nature of much of the information the departments deal with, security classification on information is crucial to any Knowledge Management strategy.

Accessibility

Accessibility for citizens and business to Canadian government information on the web is supported by a Common Look and Feel Policy.

Treasury Board has mandated a standard for the "look and feel" of all Government of Canada websites.



International Trade and the Web
International Trade Canada (ITCan) has used the above guidelines in developing its own departmental web sites for Canadian and foreign access.

Canadian businesses (and citizens) have a single portal for government information at http://canada.gc.ca. The link for Canadian businesses from the Canada Portal gives access to all Canadian government services for exporters.

From this site, the potential exporter can go to the export information site, which links to the Virtual Trade Commissioner (VTC).

Virtual Trade Commissioner
The Virtual Trade Commissioner project of ITCan has been a major component in the Canada Online strategy and is aimed at improving access to information for Canadian exporters. The site is specifically mentioned in the 2005 annual report on progress toward Canada Online.

Launched in November 2002 by the Canadian Trade Commissioner Service of ITCan, the Virtual Trade Commissioner is an interactive on-line tool that creates a personalised Web page for Canadian clients and provides a gateway to the Trade Commissioner Service.

Export Development Canada (EDC) and Canadian Commercial Corporation (CCC) have joined forces with ITCan to expand the toolkit of the Virtual Trade Commissioner for Canadian business. In addition to the Virtual Trade Commissioner's customised market and business information, the site integrates EDC's trade, finance and risk management services, as well as CCC's services in international procurement. Services of Agriculture and Agri-Food Canada and Canadian Heritage will soon be available.

The Virtual Trade Commissioner is especially useful for small and medium-sized exporters. They can use the site, on their own schedule, to get international trade information straight from Canada's representatives located right in the markets that they are interested in.

There are currently more than 14,500 business clients, representing approximately 12,500 companies registered for a Virtual Trade Commissioner. In 2004, client registrations grew 81%. Approximately 2,100 partner-clients have also received accounts. Increases in volumes on the on-line channel have resulted in comparative decreases in both the in-person and mail/fax channels.

Export Source
Export Source is designed as a first point of information, especially designed for new or intending exporters. The Virtual Trade Commissioner area of the site is designed to help experienced exporters wishing to grow and diversify their markets. All parts of the web sites are self-service and allow exporters to readily access information and "How To" guides.

Further information can be found on the Virtual Trade Commissioner site:
http://www.infoexport.gc.ca/registration/CCRegistrationBenefits.jsp?lang=en

REFLECTIONS

Whole of Government approach

The overarching Canadian Government emphasis on open access to information has been a major driver in ensuring commitment to Knowledge Management and information delivery by government agencies. Simple tactics such as using a standard look and establishing cross-agency portals ensure that Canadian consumers are familiar with a more standardised set up and are quickly able to navigate through a site to find key information.

Tailoring information to individual needs

The Virtual Trade Commissioner system is flexible enough to allow exporters to select certain sectors and markets that are of interest to them. This strategy is an attempt to limit information overload and meet exporters' real business needs.

Case Study – New Zealand

BACKGROUND

New Zealand Trade and Enterprise (NZTE) believes that:

> *Knowledge management is a professional discipline that utilises a mix of technological and social network skills, to better document, capture and utilise sources of knowledge existing within an organisation.*

The role of Knowledge Management in a Trade Promotion Organisation is seen by NZTE as follows:

> *Two roles are 1. Harnessing existing knowledge to improve the efficiency of the TPO, and 2. Transferring knowledge to allies and companies who can use and build on this knowledge to their own firm's competitive advantage.*

NZTE was formed in June 2003 after the merger of Industry New Zealand and Trade New Zealand. NZTE was a new organisation with new Knowledge Management challenges.

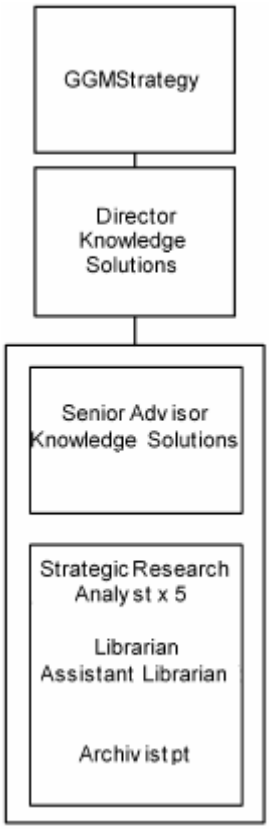
NZTE's Knowledge Management strategy initially focused on technology, particularly merging predecessor systems and databases. Two intranets were merged into one, and two Document Management Systems were also merged into one.

KEY FEATURES

NZTE has recently restructured its Knowledge Management team to ensure closer alignment to its strategy, and integration with other business units. In order for NZTE to successfully implement a new strategy and meet its strategic goals, NZTE has identified that it must have robust business processes and systems to manage information and knowledge.

The Knowledge Management team is now called Knowledge Solutions to reflect a more proactive, solution-based integrated offering as part of the wider Strategy Group offering. NZTE believes that the Knowledge Solutions team is a critical delivery arm for the successful implementation of the new strategy.

The role of the Knowledge Solutions team is to provide leadership in the area of Knowledge Management within NZTE by facilitating the capture and flow of information into and around the organisation, and by identifying opportunities to provide knowledge-based solutions to meet business requirements.



Key initiatives are to:
Foster a knowledge sharing culture within NZTE:

- Establish knowledge sharing competencies within all NZTE performance management agreements
- Investigate the need for communities of practice and/or collaborative technologies

Improve alignment with other business-unit objectives:

- Review business-unit objectives
- Become involved in projects
- Increase links with the PMO (Project Management Office)

Ensure access to information is efficient and timely:

- Conduct an information audit
- Implement library management software
- Assess the value of general research services
- Redesign and reposition the Intranet as a core tool

Increase awareness of what Knowledge Solutions does:

- Strengthen Knowledge Solutions networks and relationships NZTE wide
- Update Knowledge Solutions information on NZTE's Intranet, SuperTED

Develop robust record keeping practices:

- Develop a records management policy
- Develop a file classification system
- Develop a comprehensive training and communication strategy on record keeping

Key Challenges:
Building awareness of what Knowledge Solutions does:

- Re-educate staff beyond the notion that Knowledge Solutions is just a library and research tool

Finding improved solutions to the 'onshore/offshore divide':

- Access to market and project information

Creating a collaborative cross-organisation information sharing environment:

- Document sharing and virtual work sites, particularly challenging in a period of intense change post-merger and during a strategy implementation roll-out

REFLECTIONS

New Focus

NZTE restructured and realigned its Knowledge Management team to reflect a more business-solution focus. NZTE identified a need to work closely with individual business units in a more proactive way, rather than responding to individual research and ad hoc requests.

A new business plan will ensure there is an emphasis on building networks and relationships across the business, with a focus on working with teams to assist them to meet their strategic goals.

For example, while the role of strategic research analyst predominantly remains the same (providing research services to support business units), the role now includes the proactive identification of areas where Knowledge Solutions can improve Information and Knowledge Management. Strategic research analysts are now the 'eyes and ears' of the Knowledge Solutions team and are responsible for feeding back issues to the Senior Advisor and Director for improvement.

There is also an increased focus on the integration of the senior advisor into core corporate projects, for example the implementation of a new version of NZTE's Document Management System, and the redevelopment of NZTE's Intranet. The senior advisor works closely with the IT and other corporate departments.

Reselling the value of the team

With a new focus, the Knowledge Solutions team now needs to 'sell' its revised value proposition. The Knowledge Solutions team needs to change the perception of the team from a traditional library and research based function to a of provider knowledge-based solutions.

The Knowledge Solutions team has created marketing collateral to be inserted into induction packs for new staff who join NZTE, as well as updating information on

NZTE’s Intranet, generating case studies and holding regular meetings with individual business units.

Conclusions

Responsibility of Knowledge Management
It was pleasing to note that the majority of TPOs have a formal Knowledge Management strategy in place, and a business unit responsible for its implementation. In some cases it is a designated Knowledge Management team, and in others it is the responsibility of the Information Technology team.

Defining Knowledge Management
There is no clear agreement on the definition of Knowledge Management. However, there is general acceptance that it incorporates the use of new technologies along with changes to business culture, which will ensure that knowledge is shared more easily, and knowledge assets are available for reuse across the organisation.

Capturing the value of Knowledge Management
A number of TPOs expressed the concern that the benefits of new Information Technology systems are usually clearly defined, but that it is harder to define the true value of softer Knowledge Management objectives, such as knowledge transfer and collaboration. A solution to this could be regular polling of staff feedback during the roll-out of Knowledge Management projects in order to measure user satisfaction.

Why Knowledge Management?
The reasons for adopting Knowledge Management strategies are usually related to improving organisational performance. Reasons given included the ability to reuse information and knowledge without 'reinventing the wheel'; the importance of creating a more skilled and knowledgeable workforce to engage better with clients; supporting general corporate objectives and providing better customer service. There is a realisation that Knowledge Management can play a key role in improving organisational performance.

The ability to interact with SMEs was not specifically mentioned as an objective of a Knowledge Management strategy. However considering the use of Knowledge Management within organisations, it is clear that this is in fact perceived as a key role for TPOs and one of the main benefits of adopting a well-integrated Knowledge Management strategy.

Rewarding Knowledge Management behaviours
A clearly defined Knowledge Management strategy will encompass training and Human Resources issues, along with rewards for exhibiting Knowledge Management behaviours. Knowledge Management teams need to interact closely with their Human Resources team in order to work on these shared objectives. Although some global organisations have integrated their Knowledge Management team into their Human Resources team, there were no similar examples in this study of TPOs.

Virtual Knowledge Management teams
In the case of KOTRA, a deliberate strategy has been followed to disperse the Knowledge Management team amongst various business units to ensure maximisation of Knowledge Management penetration. The team works in effect only as a 'virtual team'. A similar strategy has in part been followed by NZTE, with Knowledge Solutions team members physically located with other business units. However both of these initiatives seem to be limited to dispersal across business units in their head offices.

Knowledge champions
From a wider perspective, a globally dispersed Knowledge Management team could assist with Knowledge Management issues across globally dispersed business units. This team could be made up of regional knowledge champions who raise the profile of the existing Knowledge Management team.

KNOWLEDGE MANAGEMENT TECHNOLOGIES

Overview

Knowledge Management tools and technologies include a wide range of technology solutions, from standard document and email storage packages to sophisticated collaboration tools designed to support community building across an organisation. Systems can be developed in-house or purchased off the shelf. Generally, tools fall into one or more of the following categories: knowledge repositories, such as Document Management Systems; expertise finding tools; collaboration tools such as discussion and instant messaging technologies; and searching and data mining tools.

Knowledge Management tools are normally introduced to meet specific business needs, and the range of tools that any organisation has is directly related to its own business needs, size and locations.

Document Management Systems

Overview

Just over half (52%) of participants have implemented a Document Management System, while 42.1% are planning to implement a Document Management System.

Have you implemented a Document Management System within your organisation?

Answer	Number	% of Total
Have implemented	10	52.6%
Are planning to implement	8	42.1%
Are not planning to implement	1	5.3%

Only two participants (22.2%) implemented a Document Management system more than five years ago.

When did you first implement a Document Management System?

Answer	Number	% of Total
<1 year ago	0	0.0%
1-2 years ago	2	22.2%
2-3 years ago	3	33.3%
3-5 years ago	2	22.2%
>5 years ago	2	22.2%

Most Document Management systems tended to be customised software. Examples include:

- Web Application (ASP, PHP)
- iManage
- Hummingbird
- Dom.doc
- Customised software operated on an open source platform
- Custom developed software using a web browser
- Control Express
- Bizflow groupware implemented by Handysoft co

Most (90%) Document Management Systems are accessible from both onshore and offshore offices.

Is your Document Management System accessible from both onshore and offshore?

Answer	Number	% of Total
Onshore only	1	10.0%
Offshore only	0	0.0%
Onshore AND offshore	9	90.0%

For most participants (70%) it is mandatory for staff to save documents into the Document Management System, although this is an automatic process for only three (30%) respondents.

Is it mandatory for staff to save documents into the Document Management System?

Answer	Number	% of Total
Yes	7	70.0%
No	3	30.0%

Is saving documents into the Document Management System a manual or automatic process?

Answer	Number	% of Total
Manual	5	50.0%
Automatic/System Generated	3	30.0%
Manual AND Automatic/System Generated	2	20.0%

Management and training of Document Management Systems is generally the responsibility of the same department:

Knowledge and Information Management Division. (Canada)

IT; administration. (Hong Kong)

Administrative Affairs Division. (Japan)

Registry and IT. (Singapore)

KS Team and the IT Team. (New Zealand)

The application manager of Information Technology team. (Korea)

One of the MEDT departments. (Russia)

Responsibility belongs to the person who is putting the files into the system. I'm not sure who is maintaining the system itself. (Mexico)

Director of Information and Export Training. (Indonesia)

International Trade Information Center. (Thailand)

Case Study – Canada

BACKGROUND

Foreign Affairs Canada and International Trade Canada (DFAIT) determined that they needed an organisation-wide Document Management System. Documents were being held either in shared drives or on personal c:/drives. A Knowledge Management overview determined that a Document Management System with shared documents available to all staff was a desirable tool to facilitate Knowledge Management.

Selection of an appropriate Document Management System was fairly simple as the Canadian Government has decided that all departments using a Document Management System should use a standard one, a Hummingbird product. Hummingbird is a Canadian company, and has been tasked with the whole Government Records, Document and Information Management System (RDIMS) project. It is possible for departments to buy different add-ons but effectively, the product is able to exchange information with other departments. It is no longer possible for government departments to purchase any other Document Management System, although those with other existing Document Management Systems are able to continue to have them supported in the interim.

Even though DFAIT has had a version of a Document Management System in place for the last ten years, many staff were reliant on shared drives. The aim was to have every desktop server replaced (3,000 staff at headquarters and 7,000 overseas) and a standard system introduced. An initial pilot was run in the Head Office in 2003-2004, followed by a two-year implementation project launched in January 2005.

IT Support
There was a need for the IT team supporting the change to really understand the business needs, especially those of offshore staff. IT support focused on assisting cultural change by showing users the benefits of the system, rather than trying to enforce use of the Document Management System.

IT support was divided into teams that mirrored the structure of the wider business. The focus was on connecting offshore staff, and on saving information that was useful to them – switching from paper based systems was important.

Information Management Revitalisation
As the system being implemented was relatively new, the IT team created the term ‘Information Management Revitalisation’ to describe the process.

As part of the project, Information Management needed to implement new Information Management policies and procedures, which were accessible to users and would bring real results. It was also agreed that the Information Management team should publish Information Management best practice case studies. Information Management support services were realigned to focus more on the offshore network, which had been less well supported in the past. This package of policies, practices and support systems is known as ‘InfoBank’.

Staff responsibilities
All staff are responsible for putting their own information into the system. Now that the focus is on electronic record keeping, there is no longer a need for a dedicated

paper records office to maintain records. Canadian government legislation clearly states that the responsibility for records management lies with the individual.

An electronic record is all that is required in 95% of cases. It is expensive in terms of labour and storage to keep paper records, so staff are encouraged to use the Document Management System.

KEY FEATURES

The 'Infobank' is integrated into Outlook and appears on the same screen on the desktop. A list of recently edited documents appears as a worklist in Infobank – the last 30 are displayed. A document can be saved as a new version, a subversion or a new document, and a full history and version control is visible.

Profile Card

When staff elect to place a document into the Document Management System, a profile card appears prompting staff to fill in the following information:

- Language (French or English)
- Author
- Document type
- Date
- Transitory or enduring – default setting is transitory. The metadata for transitory documents are in the hands of the individual, however once a document becomes enduring, control passes to the IT section
- Local or not saving
- Access – no standard default to open view
- Number of document – automatically generated
- File number (not assigned to the document) – automatically generated

Staff are being trained to use standard default profile cards, so that the information and time required for entering a document into the Document Management System is minimal. However, staff are required to make a distinction between documents depending on their importance.

The system is designed to manage unstructured documents – such as e-mail and those created using word processing software. For *Word* documents, for example, one of the chief benefits of the system is the ability to manage and control versions. Other systems in the departments manage structured documents such as financial transactions.

Saving documents locally is also useful, and in the past offshore missions have asked for the ability to enter documents into the Document Management System but not to share them globally.

Searching

The search functionality is robust. Staff can conduct a simple search on full text or title, but a more advanced search allows staff to search on any of the metadata saved onto the profile card.

Folders

Staff can use a folder relevant to their activities. Individuals can share folders with other team members and documents can appear in more than one folder, but they

are not duplicated. Effectively, all that one stores in the folder is a link to the actual document.

Emails
When staff send an email, a pop-up window asks if they want to place the email into the Infobank/Document Management System. The subject line of the email automatically becomes the title of the document in the Document Management System. The To and From fields are added to the profile card for emails, which is very useful for performing searches.

REFLECTIONS

Invisible File Plan
A file plan is customarily used for managing the 'retention and disposal' schedule relating to documents. While users are generally accustomed to the need for correct file numbers on paper documents placed into a records environment, they are less aware of the need to correctly apply file numbers to electronic documents. Users usually do not need to use the file number for subsequent retrieval of a document, as most Document Management Systems have powerful free text search engines built into their specifications.

In Canadian experience, the error rate in assigning file numbers is very high. Although an organisational file plan exists in DFAIT, it is invisible to staff, unless the option to turn the file plan 'on' is used. As the preference is to leave this feature off, staff are not required to select a file.

Training was an important part of the roll-out of the new Document Management System
Staff need tools, policies and practices that support them in their daily work, and at the same time help the organisation to meet legislative requirements for saving documents.

The IT team needs to provide training and support for individuals on what to save, where to put documents, and how to describe documents for future retrieval.

In Canada's case, Document Management System training is managed by the Information Management team. A full training programme was given as part of the roll-out of the Document Management System (a full day of training for each staff member). IT staff are also assigned to workgroups to provide ongoing support to individuals. Actual training is provided by trainers from the Foreign Service Institute. Training also makes up part of the induction process.

There has been a gentle approach to compliance by individuals
At the moment there is no intention to audit individuals to determine whether they are using the Document Management System, and network drives are still available for staff to use. There is an expectation that over time the amount of documents on network drives will decline as documents are placed into the Document Management System. Departmental managers will be provided with tools to monitor use of the Document Management System.

The situation will be reviewed after a year, and if there is not sufficient user buy-in, access to the network drives may need to be closed off.

Integration with Outlook email system very important

Staff are able to easily shift between Outlook and the Document Management System, and there is a simple ‘click-n-drag’ facility. Also the folder structure is sensible and easy to understand as staff are already acquainted with Microsoft Outlook.

A standard build and global access to the Document Management System are important features

Staff in the departments were previously accustomed to using local shared drives for saving documents. The new global Document Management System is a step forward in knowledge sharing.

The Canadian implementation is quite different from the New Zealand implementation of a similar Document Management System, in that the Canadians have opted for greater privacy on documents, and local document holdings. New Zealand has opted for transparency of information. It will be interesting to audit user experience with the Document Management Systems to gauge whether the greater privacy controls offered by the Canadian model equate to better user acceptance, and whether the knowledge sharing benefits of the Document Management System are limited by users applying restrictive user security to documents.

Case Study – New Zealand

BACKGROUND

New Zealand Trade and Enterprise (NZTE) was formed in June 2003 after the merger of Industry New Zealand and Trade New Zealand. Both predecessor organisations operated a centralised Document Management System, so a new system needed to be implemented.

After extensive consultation with representatives throughout the business, the selection team evaluated each system in the following areas:

- Document Management – incorporating searching, storage and versioning
- Records Management
- Security – incorporating user security, administrative security, global security and physical security
- Administrative functions
- Extensibility
- Integration – with desktop applications and with 'back-end' systems such as the Customer Relationship Management systems and Finance
- Technical system requirements
- Risk
- Cost

iManage was chosen as the preferred solution according to the criteria listed above. It also assisted NZTE to meet statutory obligations under the Archives Act, the Government Data Management Policies and Standards policy, the Official Information Act and its obligations regarding Parliamentary Questions and Ministerials.

iManage also had the capability for NZTE to deploy global collaborative environments for staff and, if desired, for business partners and other government organisations.

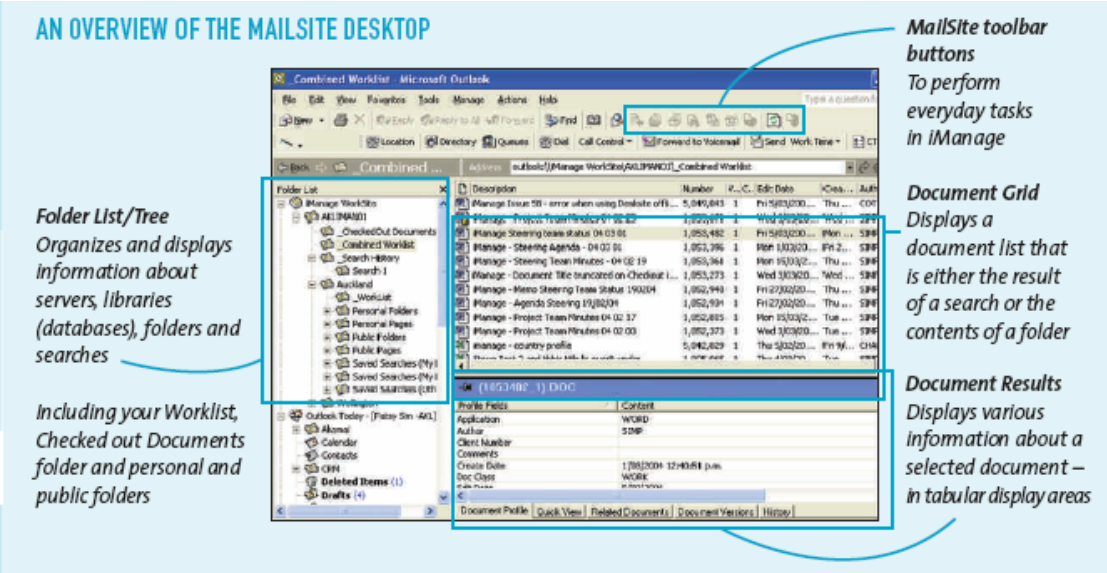
NZTE has opted for full transparency of information via the Document Management System. All staff are required to save all documents into the system. Onshore staff do not have access to save documents locally and are automatically prompted to save their documents into the Document Management System. Staff are also encouraged to save their emails into the Document Management System, although this is not an automatic process.

KEY FEATURES

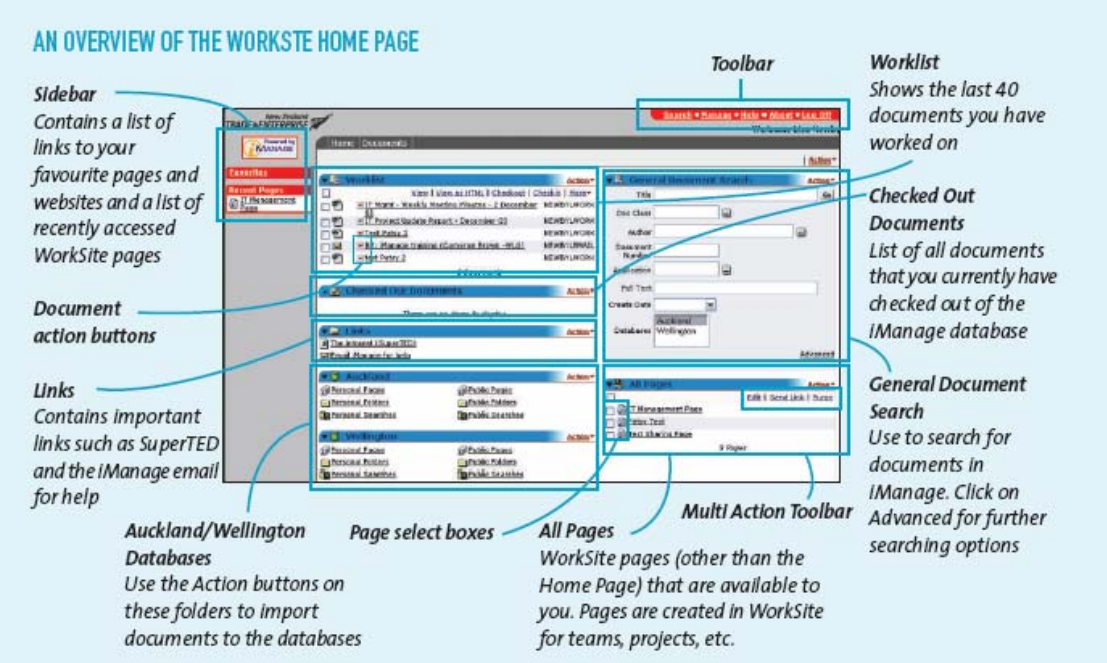
iManage is NZTE's organisation-wide Document Management System. NZTE operates two versions of iManage: Mailsite and Worksite. Both Mailsite and Worksite have the same basic functionality: creating documents, editing documents, saving documents as a new version, checkin/checkout, audit trail, changing profile information, full text searching, assigning security and access rights, creating folders and many other basic document management functions. However each system has different functionality that is specific to itself.

iManage Mailsite

This system provides seamless access to organisation-wide content and document management functionality directly from Microsoft Outlook. Emails and documents are easily managed in one application.

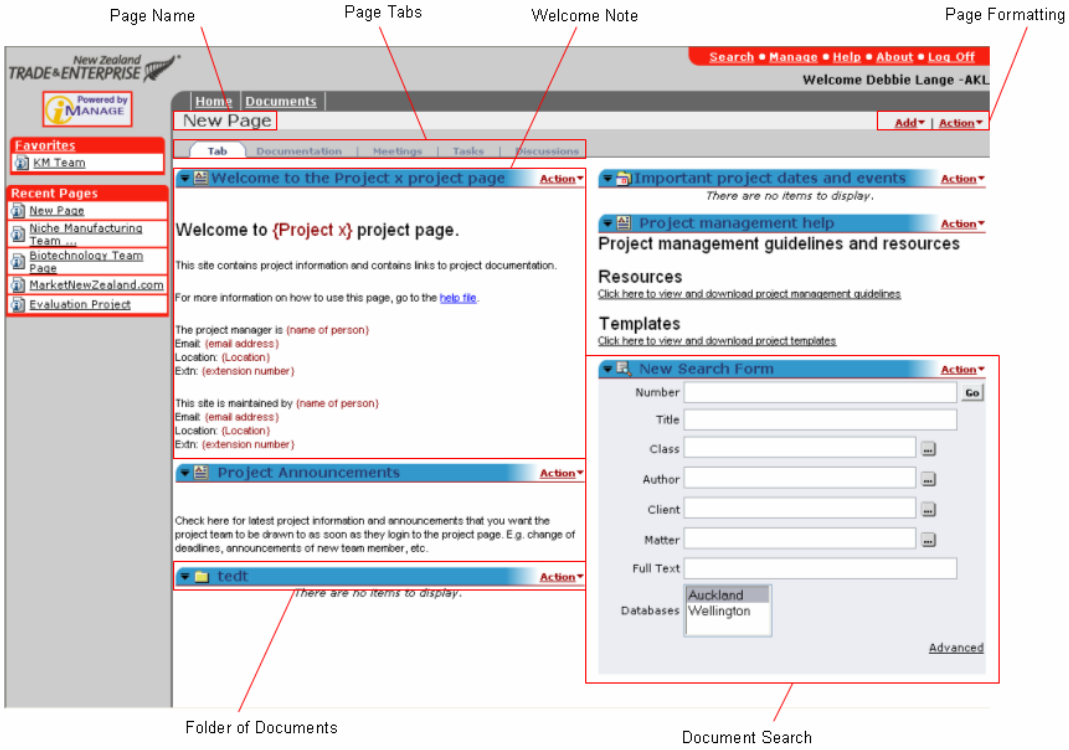


iManage Worksite
This is the web version of iManage enabling access to iManage anywhere in world without having an NZTE computer with Mailsite installed. A unique feature of Worksite is the ability to create collaborative pages that are web-based.

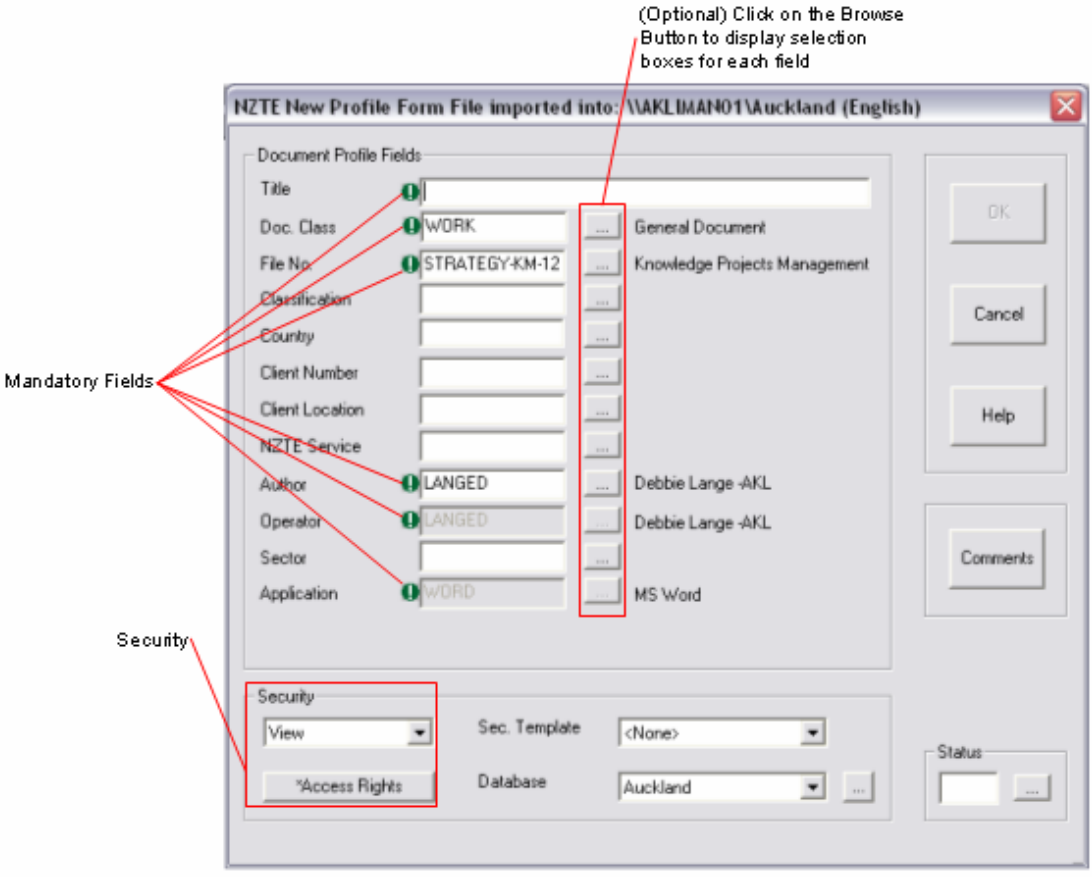


iManage worksite collaboration pages
A collaboration page is a virtual shared workspace, created to provide a secure environment in which NZTE staff collaborate or share information. Pages can include folders, searches, links to documents, calendars, tasks, URL links and

threaded discussions. Content within Worksite is also visible in Mailsite and appears in either Public or Personal Page folders.



When a new document is created in Word, Excel or PowerPoint, a document profile is completed. Saving documents into iManage is a mandatory and automatic process within NZTE.



REFLECTIONS

Deployment Offshore Problematic

In general, the deployment of iManage after the merger of the two predecessor organisations has been successful. Staff onshore now use iManage Mailsite as part of their daily work processes. NZTE has struggled with the global deployment of the Document Management System, although great progress continues to be made.

Initially, offshore staff only had access to the web version of iManage – Worksite. Connection speeds were incredibly slow which made the process of using Worksite very cumbersome. Anecdotal evidence suggests that in some cases it took up to two minutes to open a document.

NZTE has undergone an aggressive upgrade of its global IT infrastructure and has deployed Mailsite to all offshore offices. Connection speeds are markedly improved and staff are beginning to use Mailsite as part of their daily practices. However offshore staff still have access to a shared drive which they continue to use, and there are still delays in connection speeds which hinder uptake of the system.

Training

Training on the Document Management System is the responsibility of the IT department, where there are two dedicated trainers.

All onshore staff received training by the IT team and external consultants during the merger. Refresher courses are also organised to ensure all staff have a basic understanding of how to use the Document Management System. New staff receive training when they join the organisation.

Offshore staff have received training as part of the global IT infrastructure upgrade. All staff are supported via an IT Help Desk and are able to call the IT trainers at any time.

Email Management

NZTE has taken the stance that all documents, including emails, should be saved in the Document Management System. While this is an automatic process for documents, transferring emails from Microsoft Outlook into iManage is still a manual process.

Use of iManage for email management is therefore ad hoc: some staff consistently transfer important emails into iManage, while others simply ‘dump’ all their emails into iManage to clear their Inbox as a result of size restrictions enforced by the IT department.

While this may seem like model email management behaviour by staff, it has resulted in a large number of personal and ‘non-corporate’ emails being loaded into iManage.

Collaboration

iManage was selected as the preferred Document Management System as it contained collaborative functionality via its web version Worksite.

Worksite is freely available to all staff and training has been given to staff on how to create collaborative shared workspaces. Uptake on collaborative pages has slowly

increased. Some pages are simply used as discussion boards, others are used for team administration – staff leave, meeting minutes etc.

Like many collaborative pages, there is a tendency to create them but unless they are embedded into everyday work processes they become redundant platforms that don't provide any unique information. Unless collaborative pages are the only place to find key information, are continually updated, and are carefully managed and maintained, they tend to become surplus to requirements.

NZTE will be deploying a new version of iManage towards the end of 2005.

Client Management and Business Matching Systems

Overview

Ten (52.6%) participants have implemented a Client Management System, while four (21.1%) participants stated that they are not planning to implement a Client Management System.

Have you implemented a Client Management System within your organisation?

Answer	Number	% of Total
Have implemented	10	52.6%
Are planning to implement	5	26.3%
Are not planning to implement	4	21.1%

Almost half (40.0%) of Client Management Systems were implemented between one and two years ago.

When did you first implement a Client Management System?

Answer	Number	% of Total
<1 year ago	0	0.0%
1-2 years ago	4	40.0%
2-3 years ago	2	20.0%
3-5 years ago	0	0.0%
>5 years ago	4	40.0%

Similar to Document Management Systems, most Client Management Systems were developed using customised off the shelf software.

- Lotus Notes
- Oracle software
- Samsung SDS
- Pivotal
- In-house developed

Most (80.0%) Client Management Systems are accessible from both onshore and offshore offices.

Is your Client Management System accessible from both onshore and offshore?

Answer	Number	% of Total
Onshore only	2	20.0%
Offshore only	0	0.0%
Onshore AND offshore	8	80.0%

All (100.0%) participants who have implemented a Client Management System state that is mandatory for staff to save information into the system.

Is it mandatory for staff to save information into the Client Management System?

Answer	Number	% of Total
Yes	10	100.0%
No	0	0.0%

Saving information into the Client Management System is predominantly a manual (40.0%) or manual and automatic process (40.0%).

Is saving information into the Client Management System a manual or automatic process?

Answer	Number	% of Total
Manual	4	40.0%
Automatic/System generated	2	20.0%
Manual AND Automatic/System Generated	4	40.0%

Management of the Client Management System:

Group Manager- KM. Recently passed to Group Manager - IT Business Services. Not sure if this will be permanent. (Australia)

Trade Commissioner Service, Corporate Services. (Canada)

Head of Commercial Information Department- Manager of System Developing Department (Chile)

Information Systems Division. (Japan)

The Office of the Chief Information Officer. (US)

Owner is the Strategy Team, but there is extensive input from other business units. (New Zealand)

The CRM coordinator of customer management team. (Korea)

Almost all (14 of 17) departments of MEDT of Russia, Federal Customs Service, Ministry of Information Technology and Telecommunications of Russia, etc. (Russia)

Project Manager for External Promotional Management Systems. Survey was made by external company. The current client system, we use the Balance Scorecard that is an integral system. One of them includes customers. They survey in an automatic way. Once you deliver the product and complete the task, as far as I know the system sends an email or a questionnaire to the customer. (Mexico)

Director of Export Promotion and Training assisted by IT Manager Head of Database and Information Network Division. (Indonesia)

Training of Client Management System:

A (very part-time) regional trainer in each region. (Australia)

Canadian Foreign Service Institute. (Canada)

Information Systems Division. (Japan)

The Office of the Chief Information Officer will work with the IT staff from the domestic field and the overseas field to develop and implement a training strategy. (US)

IT. (New Zealand)

The CRM system coordinator of e-KOTRA team (Information Technology team) (Korea)

Appr. more than 10 MEDT departments (system of training is wide enough. (Russia)

Project Manager External Promotional Management Systems. She is the link person between the people who back up the system everyday and the contact with all offices abroad and in Mexico. This person functions as link if there is a new directive into the system, or new updated way to manage the system. (Mexico)

Director of Export Promotion and Training. (Indonesia)

Case Study – Japan

BACKGROUND

Japan External Trade Organisation (JETRO) first implemented a Client Management System in 2002. The goal was to determine its customers' needs in order to provide a better service.

Prior to implementation each division had its own customer database, which needed to be centralised. JETRO initially contracted Commercial company database services to supply data in order to qualify current data and demographics and to assist in the de-duplication of data.

The de-duplication of data became a substantial project, and so JETRO discontinued the contract with the database services and made the de-duplication an internal function. JETRO believes it has increased its efficiency by managing the de-duplication internally.

JETRO now operates a central client management database, with a strong focus on meeting customer needs. JETRO is currently reviewing its Client Management System in order to:

- Utilise information more effectively to meet the information needs of its customers

- Ensure compliance with the new Personal Information Protection Law which came into force April 2005

KEY FEATURES

The Client Management System is managed by the Information Systems Division within JETRO. The system has links to JETRO's online international business matching site or TTPP (Trade Tie-up Promotion Program) http://www.jetro.go.jp/ttppe/.

TTPP allows customers to:

- Browse through business proposals from around the world in English and Japanese
- Register and transmit business proposals
- Receive assistance with contacting foreign companies
- Receive email notification for business proposal matching

When a customer makes a change to their registered information on TTPP, the updated data is then sent to the Client Management System database.

Pre Login Page

A Input Box
Registered users can click here to login.

B User Registration
Apply here to register as a user. First-time users should read "What is the TTPP?" On the post-login page, the "Proposal Registration" and "Confirm/Correct your Info" menus are displayed.

C Proposal Search
Four methods of searching for proposals are available: Power Search, Buyer/Supplier Proposals (last 30 days), Proposal Data by Area/Business Field and Special Corner.

On the post-login page, "My Catalog" menu is displayed. Users can create a list of proposals.

Post Login Page

D Help Menu
Users can find answers to questions about using the site here.

E Header Menu
Announcements, user comments ("Voice of Users") and global links are listed here.

F Main
The top page introduces proposals under Today's Proposals (five new proposals, updated twice daily); Buyer/Supplier Proposals (proposals of the last 30 days); and the Special Corner (proposals arranged by featured category).

G Global Partners
Users can link to business-matching web sites operated by foreign government organisations with links to the TTPP.

Proposal Details Pages
Unregistered users cannot view additional information posted on the post-login page.

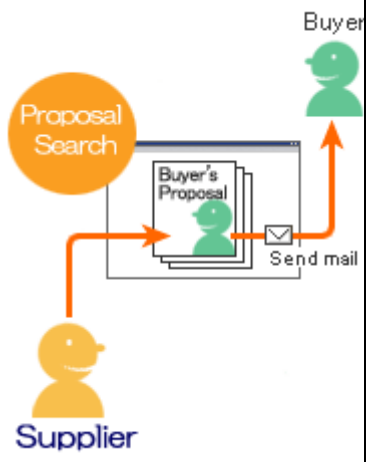
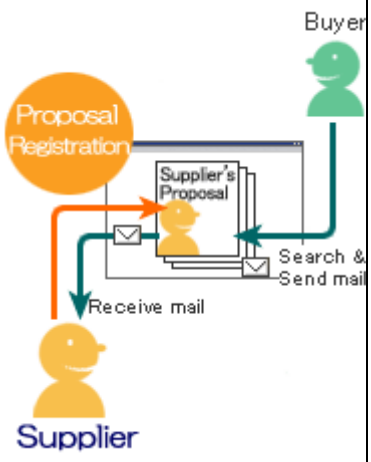
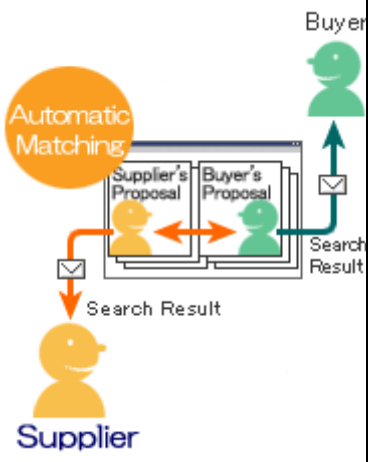
Pre Login Page

The post-login page offers special services and information for registered users only.

Post Login Page

Users must register to receive a user ID and password for logging in.

Partner Matching Method
The TTPP offers several ways to match business partners:

Supplier Sends Inquiry	Buyer sends inquiry	Computer makes match
		
A supplier searches the database, finds a company looking for a product it supplies, and sends an inquiry by email to the buyer.	A buyer searches the database and finds a company offering the product it needs, and sends an inquiry by email to the supplier.	The TTPP system automatically searches for companies with similar interests and contacts both parties by email when a match is made.

REFLECTIONS

JETRO's continued emphasis on customer satisfaction and more customer-oriented services have resulted in the production of a sophisticated Client Management System. The TTPP web site provides a simple yet detailed overview of the system enabling customers to quickly understand its value and what it has to offer. JETRO has harnessed technology to enhance user experience.

User Customisation
JETRO has ensured that the TTPP web site is user friendly and that the user can customise its content. This reinforces customer satisfaction and puts the content in the hands of the user. For example, once a user logs into the site, the 'My Catalog' menu is displayed, where users can create a list of proposals, browse through other proposals and select whether they want to receive email notification for matching proposals.

Integration
JETRO has also focused on system integration while developing the Client Management System to overcome a history of duplication and multiple databases. De-duplication of JETRO's database will ensure it has the most accurate and up to date information on its clients. JETRO believes that this is an ongoing process rather than a one-off initiative, as records need to be checked continually for inaccuracies, duplication and inconsistencies.

Case Study – Korea

BACKGROUND

KOTRA's Customer Relationship Management strategy focuses on 'maximising the value of customer relationships'. Customer satisfaction is more important to KOTRA than ever before. KOTRA's corporate philosophy stresses customer concerns and ensuring systems are in place so its customers receive the right services at the right time.

As a way to systematise ongoing innovations, the Customer Relationship Management system was put into operation in a comprehensive manner. A brief time line follows:

- November 2001 – CRM Task Force team formed
- March 2002 – CRM strategy
- July-December 2002 – CRM implementation
- January 2003 – pilot test
- February 2003 – CRM opened

KEY FEATURES

KOTRA's Customer Relationship Management strategy focused on four major areas:

- Transforming KOTRA's homepage, Digital KOTRA to a user-friendly web site
- Connecting CRM system to KOTRA's business process management system
- Analysing customer data and using it for marketing activities
- Connecting CRM system to evaluation system for both personal and organisational performance

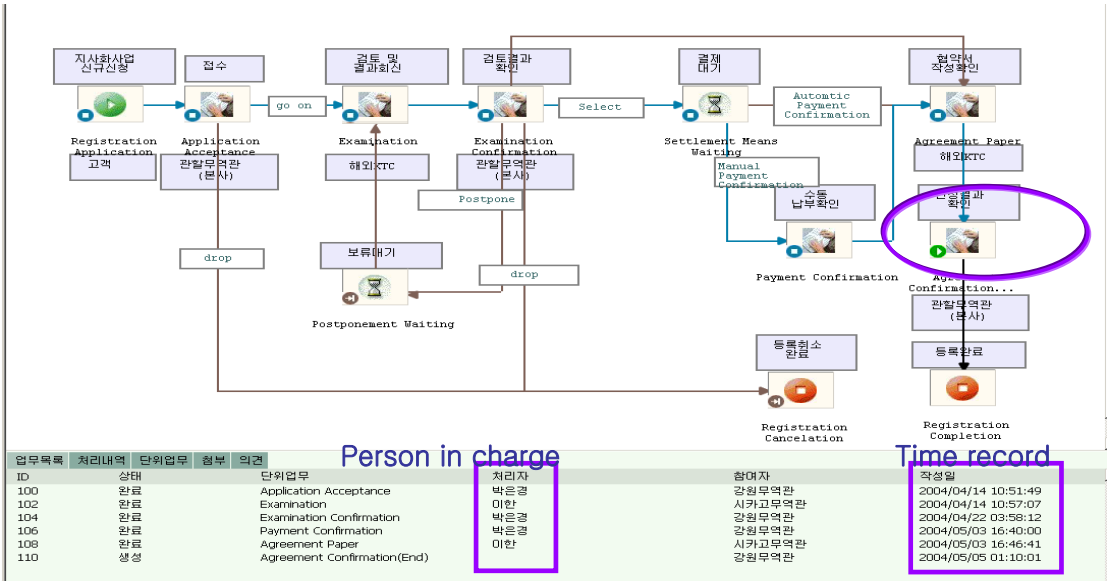
There are three parts to the configuration of KOTRA's Customer Relationship Management system:

- Collaborative CRM
- Operational CRM
- Analytical CRM

Collaborative CRM allows communication between clients and KOTRA. Clients are able to receive final reports or results by connecting to Digital KOTRA, email and SMS.

Digital KOTRA provides users with various kinds of information such as overseas market news, offers from overseas buyers, and an introduction to KOTRA and its activities. Clients can register interesting or dealing products, countries, and KOTRA's services. Clients can access market news, buying inquiries from overseas buyers, and KOTRA's news on their interests. It is also possible for clients to access their client history of KOTRA usage.

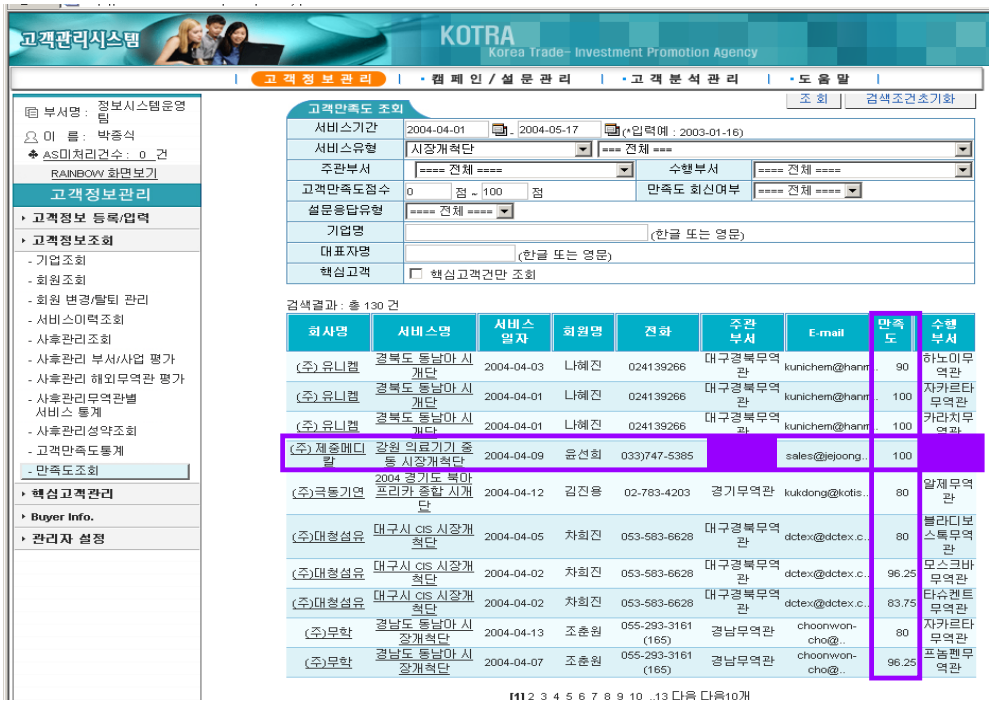
Operational CRM is the core business workflow system of KOTRA's major services. KOTRA can track and trace the entire business process from start to finish – which steps have been completed, who is in charge, present proceeding status, and so on.



Analytical CRM allows KOTRA staff to access a single integrated set of information about their clients, for example general company information, contact person information, and the customer relationship history. To promote or improve KOTRA's activities, target client lists can be extracted from the Customer Relationship Management system. By using this function, KOTRA can also analyse data for evaluation and marketing purposes.

CRM-registered performance records are data-based and are simultaneously reflected in KOTRA's Balanced Scorecard. KOTRA can evaluate customer

satisfaction, and then use this information to gauge the performance of departments or overseas branch offices. With this function, KOTRA can access information regarding following up on clients' requests.



REFLECTIONS

Overall, KOTRA has significantly increased customer satisfaction and improved business performance through its Customer Relationship Management system.

Demand for high quality information

An increasing demand for improving the quality of KOTRA's services reinforced the need for KOTRA to improve the quality of information available.

KOTRA believed the key to obtaining quality information was to merge multiple customer databases and develop standard processes for KOTRA's services. A Customer Relationship Management system was critical to the success of KOTRA's service delivery.

Planning

KOTRA dedicated a large amount of time to analysis and planning prior to the launch of its Customer Relationship Management system. The Customer Relationship Management system was launched fifteen months after a task force was formed. The planning phase included extensive testing and analysis and the development of a strategy before a pilot was implemented.

KOTRA believes that careful planning and testing is critical to successful implementation.

Case Study – Hong Kong

BACKGROUND

The Hong Kong Trade Development Council (HKTDC) began its Customer Relationship Management journey about 1997. Customer expectations were increasing – customers expected HKTDC to have a 360 degree view of them. HKTDC needed to improve its customer service by combining its collection of information and data on each customer.

KEY FEATURES

Direct links to other business systems
The Customer Relationship Management system is tightly linked to the Business Matching database which houses a databank containing over 300,000 company records of companies from within Hong Kong and overseas. A team of 20-30 people manages the Databank, focusing on maintaining the data and handling inquiries.

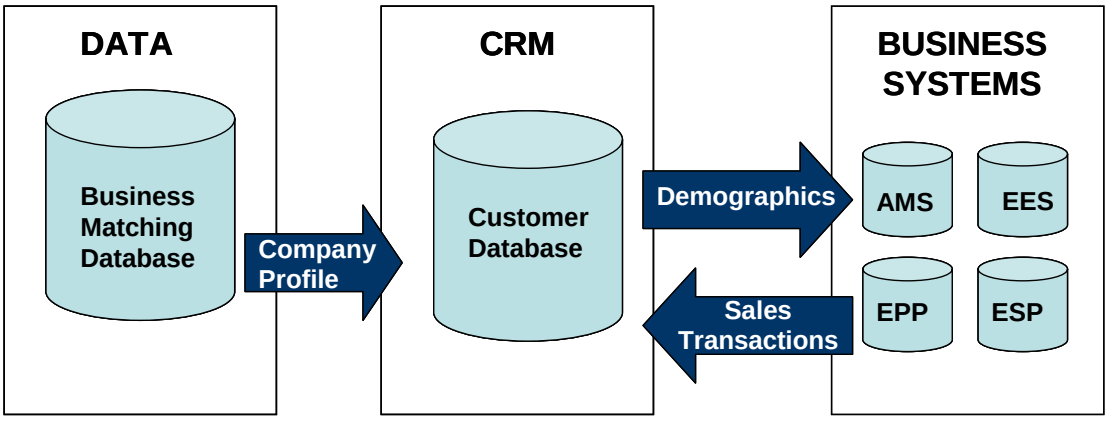
For company profile information to be sent from the Business Matching Database, a customer record must be created in the Customer Relationship Management system first. The Business Matching System then checks the Customer Relationship Management system and establishes a link. If a link is not established, the company profile transfers to the Customer Relationship Management system automatically.

Several systems capture sales transaction information. For example:

- AMS (Advertising Management System)
- EES (Event Management System)

After a customer record is created in the Customer Relationship Management system, a link is established with the other systems (AMS, EES etc), and the data is then transferred into the customer demographics of the other systems.

The Customer Relationship Management system is also used to capture customer feedback to gather more customised information, which is fed into the system for better customer service.



How the data is used
Based on the information captured in the Customer Relationship Management system, users may select existing customer records or upload a prospect list into the Customer Relationship Management system for sending out direct marketing material. Users may also request sales reports for direct marketing that has previously been sent to keep track of the prospecting process.

Staff can:

- Search company and individual records
- View organisation charts, sales information, direct marketing sent, special attention alerts and customer service feedback
- Messenger: send, receive, reply and forward a message and attachment
- Create and update company and individual records
- Set up a relationship between a company and an individual record
- Create and keep track of sales and services
- Review assignment and setup filters

REFLECTIONS

Centralised Database
HKTDC continues to integrate other existing client databases from across the organisation into its Customer Relationship Management system, which requires collaboration from all departments. HKTDC realises that not all databases can be merged into a central repository, and works on the premise of the 80/20 rule, focusing on high impact databases.

Staff usage reports
Staff usage reports are more frequent now – daily and monthly reports are created to reflect the number of incidents created on the Customer Relationship Management system, and how often staff update information. Managers receive this information, and every week there is a meeting to discuss staff usage where frequent users are identified.

After the initial implementation, HKTDC started to target support staff, then management, then senior management to ensure correct use of the system. It is now investigating customising the system for senior management so they see the key information first, rather than having to deal with detail.

Keeping the data up to date
In addition to ongoing daily updates from staff and customers, the Customer Relationship Management system is kept up to date by automatic annual updates whereby the system automatically emails companies to check details. SAS software is deployed to check duplicates based on common name, email, address etc. This is not an automatic process however, and judgement is needed by staff to determine whether there is duplication.

All Hong Kong company data is bilingual – traditional Chinese and English.

Records Management

Overview

Just over half (52.6%) of respondents do not have any government record keeping requirements, however most (68.4%) have a Records Management policy within their organisation.

Do you have any Government record keeping requirements?

Answer	Number	% of Total
Yes	9	47.4%
No	10	52.6%

Do you have a Records Management policy?

Answer	Number	% of Total
Yes	13	68.4%
No	6	31.6%

There is almost an equal split between respondents who stated their records are predominantly paper (53.6%) and those who stated their records are predominantly electronic (47.4%).

Are your records predominantly paper or electronic?

Answer	Number	% of Total
Paper	10	52.6%
Electronic	9	47.4%

Most respondents have implemented (38.9%) or are planning to implement (50.0%) an electronic Records Management System. Two organisations (11.1%) are not planning to implement a Records Management System.

Have you implemented an electronic Records Management System within your organisation?

Answer	Number	% of Total
Have implemented	7	38.9%
Are planning to implement	9	50.0%
Are not planning to implement	2	11.1%

Software used to manage the Records Management System included:

RICS / Hummingbird. (Canada)

Foremost which has been renamed Documentum Records Manager. This is integrated with the DMS. (New Zealand)

Our own software products. (Russia)

Most (68.4%) respondents have a File Classification System.

Do you have a File Classification System?

Answer	Number	% of Total
Yes	13	68.4%
No	6	31.6%

Case Study – China

BACKGROUND

China Council for the Promotion of International Trade (CCPIT) functions as both a governmental (National TPO) and non-governmental (National Chamber of Commerce) organisation. Databases are shared across the organisation, however this can often be problematic.

Records Management within CCPIT is the responsibility of the Official Documents Division. Since the founding of CCPIT in 1952, 20,000 files and 800,000 pages have been accumulated.

CCPIT is required to abide by government requirements for keeping documents and is subject to compliance checks by National Archives. In order for CCPIT to more effectively manage its paper and electronic files, it has just completed a large undertaking to electronically scan and store all records dating back to 1952.

KEY FEATURES

CCPIT's Records Management policy dictates that sustainable programmes and event files are kept as Long Term Files (permanent), while temporarily important files are kept as Short Term Permanent Files (15 years). All files are catalogued by a specialised division under the General Office of CCPIT.

Both paper and electronic files are mostly centrally managed by the Official Documents Division, or by specific departments, however some departments manage their own specialised files. These include the Arbitration Commission, Trademark and Patent offices, Human Resources and Finance who keep their own documents and archives.

Implementing Records Management Software
From early 2003 CCPIT invested RMB400,000 (US$50,000) to build an electronic version of their archived documents.

Motivation for an electronic database came from different departments within CCPIT, and from the advancement of technology. CCPIT also has videos, electronic recordings and other electronic information, all of which require archiving.

CCPIT selected its records management software via public tender. Once the software had been implemented CCPIT created an electronic version of 800,000 pages of existing files. This was a large undertaking that took approximately six people six months to complete.

The software also enables 'fuzzy' searching. It is fundamental for CCPIT to be able to capture and search for verbatim comments and remarks previously made in the margins of documents by senior leaders within the organisation. Comments and remarks tended to be made using pencil, and it was critical to retain this information. Scanning of these documents ensured comments were retained.

CCPIT believes that the software has considerably reduced time spent accessing copies of archived documents. Staff can now electronically search through their archives rather than requesting physical copies, which can be time consuming.

File Classification System
CCPIT operates a hybrid of a functional and hierarchical file classification system.

Specialist departments (Human Resources, Finance etc) maintain their own classification system and archive storage facilities.

Project files are also created and are more functionally based to capture files from multiple departments across the organisation working on a particular project together.

Every document created has a file number. CCPIT assigns an archive number towards the end of the year for archiving purposes.

REFLECTIONS

Scanning of Documents
CCPIT's initiative to scan over 800,000 pages of existing files was a massive undertaking. Not only was it resource intensive, requiring six people six months to complete, but it was critical to the efficient access to over six decades of information.

The preservation of CCPIT's documents is a government requirement. By scanning its historical documents, CCPIT not only retains the document but also comments and remarks relating to it.

This initiative seems to be quite unique and a substantial undertaking for any organisation.

Case Study – Japan

BACKGROUND

In 2001 the Law Concerning Access to Information Held by Incorporated Administrative Agencies was implemented (For more information see http://www.soumu.go.jp/gyoukan/kanri/low0404_1.htm). Japan External Trade Organisation (JETRO) is required to disclose information according to this law and manage its information appropriately. If information is requested by the public, JETRO is required to respond to the request.

In April 2005, the Personal Information Protection Law was implemented, which has wider records management and document disclosure implications for JETRO.

> *Advances in information technology have made it easier for companies to compile customer information electronically for legitimate business purposes, such as the provision of services tailored to an individual's interests or spending habits. At the same time, however, the protection of personal information has become a key concern, particularly in view of recent media reports of information leaks. The Personal Information Protection Law will respond to these concerns by requiring organizations that manage personal information databases with more than 5,000 entries to use secure information-management systems and establish procedures for handling information-disclosure requests and complaints from customers.*
>
> *Application of the law will be handled by the ministry overseeing each industry. Guidelines for applying the law will include criteria for defining personal information and setting up information management systems. When companies are deemed to be in violation of the law, ministries will provide guidance and, if necessary, order compliance.*
> *(http://www.jetro.go.jp/en/market/trend/topic/2004_11_personalinfo.html)*

JETRO's records are predominantly paper, although electronic files are part of everyday work practices. JETRO's File Classification System follows the organisational structure – files are registered by section via an online Document Management System. This system will be detailed below rather than as part of a Document Management System case study as it provides an interesting case study for records management and public document disclosure.

KEY FEATURES

Personal Information Protection Law
The Personal Information Protection Law is a general law that applies to all organisations in Japan.

Two key areas impact on JETRO:

- When JETRO captures personal information it is now required to inform the person of how it intends to use the information within JETRO. For example, receiving a business card and using the information for a range of purposes is no longer appropriate. JETRO staff are now required to inform the person at the time of receiving the card, how the information will be used.

- JETRO cannot use the information for any purpose other than that which the person has been informed of.

JETRO views the new law as a hurdle for the continued development of the Client Relationship Management system, as utilising the information effectively will be a concern. JETRO will need to strike a balance between conforming to the new law and continuing to utilise information effectively. As a minimum JETRO will be inserting disclaimers into documentation and letters. The law does not stipulate specifically how the organisation should secure personal information.

Document Disclosure System
The General Administration department within JETRO is responsible for implementing the internal rules from existing laws and communicating the new Personal Information Protection Law. The General Administration division also conducts training sessions and develops user manuals for staff.

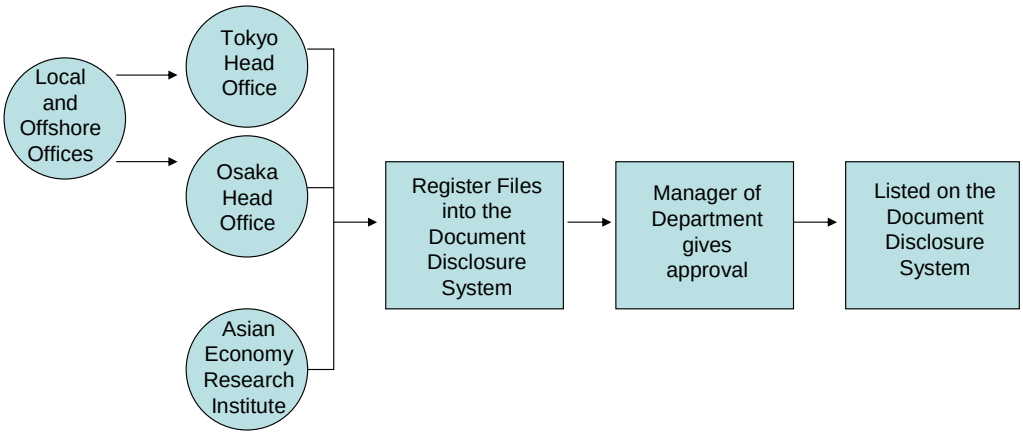
In 2002, JETRO developed and implemented an online system in order to comply with these laws. Any member of the public can access the document disclosure system via the JETRO web site and search through the database.
http://www3.jetro.go.jp/infodisc/servlet/kanribo

Documents are managed under file names and structured around organisational teams and projects. The system does not detail every document within each file. Staff use this system to manage paper and electronic documents; emails are not included in this process.
Information requested may be on a number of files. Data on each file includes file name, type, if it is paper or electronic, where it is stored and the number of years it has been saved. Documents are saved as stipulated by the law and cannot be destroyed before this time. For example:

- Simple reporting documents must be retained for one year
- Expenditure reporting documents must be retained for 10 years
- HR information or documents relating to the establishment of JETRO must be retained for 30 years

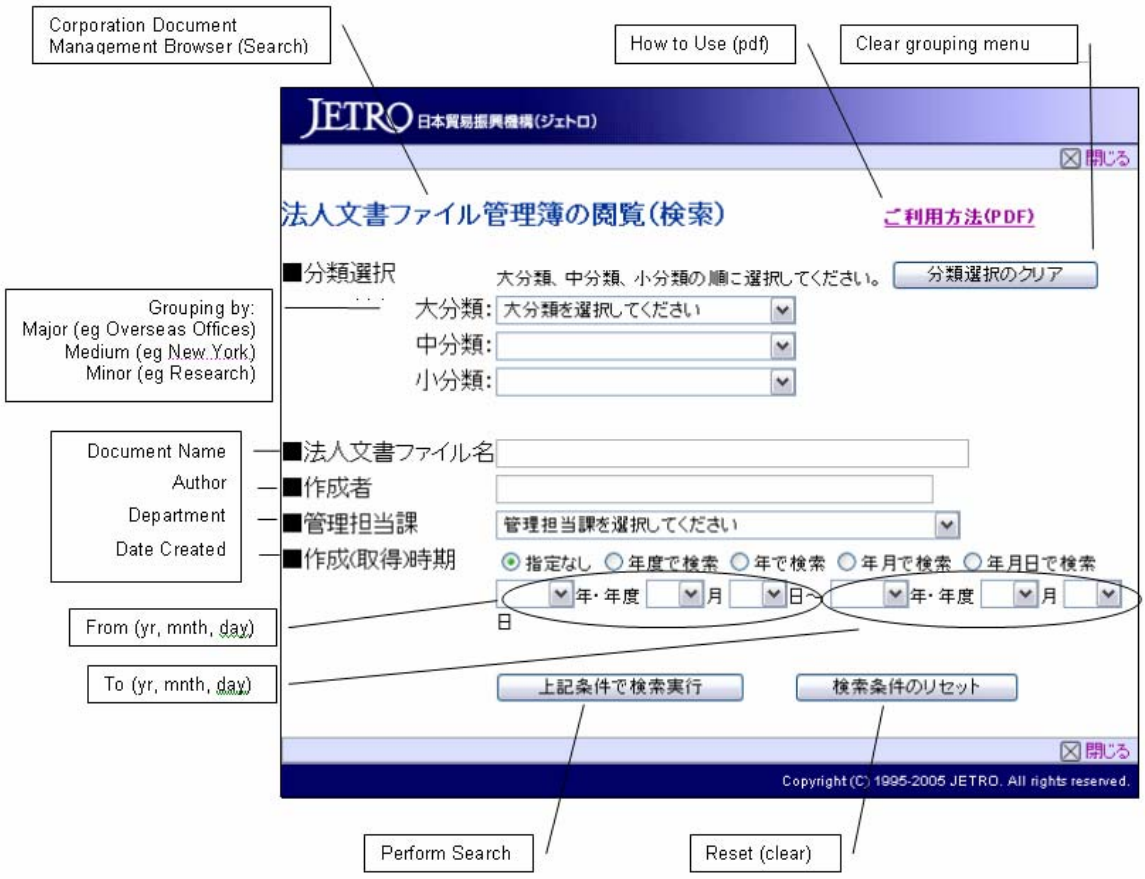
After this time, papers are destroyed to retain confidentiality and for recycling purposes. Even after the documents are destroyed JETRO is required to show on the system that the information has been destroyed for five years.

At the time of interviewing, JETRO had approximately 37,000 registrations under the system. JETRO Head Offices in Tokyo and Osaka including the Asian Economy Research Institute connect to the system and register files. Local and offshore offices register their files via an excel file that is then emailed to Head Office and loaded into the system. After the registration the manager of the document (manager of the department) will approve the document. If the data is approved by the manager it will be listed in the system.



At the end of the fiscal year JETRO collects all data from onshore and offshore, and moderates the names of the files. The system is then adjusted accordingly. The law stipulates that the information should be updated once a year.

Below is the search screen:



REFLECTIONS

JETRO's Record Management System is another example of a TPO meeting and adapting to government requirements. Both JETRO and CCPIT have undertaken large projects, which require dedicated resource in order to meet their archival requirements under government legislation.

Since the implementation of JETRO's Records Management System in 2002, JETRO has on average received only a couple of requests for disclosure of information per year. A great deal of work has gone into developing and maintaining the system to ensure compliance, for such a low number of requests.

One person is responsible for managing this process in each office in addition to day to day work.

JETRO commented that the system may be under-utilised because the system details files containing documents rather than the actual documents themselves. Perhaps the public don't know what they don't know?

Libraries

Overview

Only three respondents do not have a physical library within their organisation. Of those that do, 10 respondents open their library to the general public.

Do you have a physical library within your organisation?

Answer	Number	% of Total
Yes	16	84.2%
No	3	15.8%

If you have a physical library, is your library open to your clients, general public or just staff.

Answer	Number	% of Total
Staff	9	56.3%
Clients	7	43.8%
General Public	10	62.5%

Most respondents have either implemented (36.8%) or are planning to implement (42.1%) online library management systems within their organisation. Of those that have already implemented a system, around half (42.9%)stated that it includes material from offshore offices.

Have you implemented an Online Library Management System within your organisation?

Answer	Number	% of Total
Have implemented	7	36.8%
Are planning to implement	8	42.1%
Are not planning to implement	4	21.1%

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

Answer	Number	% of Total
Yes	3	42.9%
No	4	57.1%

Case Study - Canada

BACKGROUND

Within the Department of Foreign Affairs & International Trade Canada (DFAIT) there are a number of libraries – a major collection and team housed in Head Office in Ottawa, and libraries held in Canadian missions in Paris, Mexico, Tokyo, Washington, and New York.

The main library is set up to provide library and research services to the department and also to the Canadian public. Around 40% of library inquiries are generated by the public, and 60% are internal requests for assistance.

Library Services has made a solid transition from a print-based to an electronic environment. The current library is comprised of both a hard copy collection (books, documents, periodicals and newspapers) and a Virtual Library (over 120 information sources) available on the desktop of all employees.

In the process librarians have become highly skilled trainers and give advice and training on the Virtual Library databases to all departmental staff.

KEY FEATURES

Access
Access to the library is available to staff and also to the public. The external portal is called The LINK and is accessed from the home web site of the department. As well as The LINK, a newsletter is produced for internal audiences.

Reference Services is accessed by completing an email – the link is available from the web site.

Research requests are 60% internal, 40% external. An observation was made that internal requests tend to be more complex than external requests.

Portfolio librarians
In an effort to provide some specialist knowledge, the library's reference section is divided into five 'portfolios'. Each portfolio librarian is responsible for both a sector of specialisation, and a regional coverage for mission clients.

The library's Portfolio Service is designed to assist departmental employees by matching information sources to information needs and work requirements.
The five portfolios reflect the department's business lines. A reference librarian is assigned to each portfolio and focuses on the specialised research needs relevant to a specific client group.

The Portfolio Service liaises with sector and geographic teams internally, and ensures that teams have access to appropriate tools (see below) and also have training in use of library tools. Training is a main component of the job and is a mix of individual coaching, team presentations, and distance coaching for offshore staff, using shadow technology. Portfolio librarians also travel to missions to give onsite training to mission staff.

As well as specific training on library tools, the library team produces broad subject coaching material that is held in the 'Virtual Campus' – accessed by DFAIT Canada staff. This covers topics such as "How to Search the Internet", which is useful for all staff.

Portfolio librarians are performing a lot of outreach to staff and as well as training and research, are producing specialist newsletters and are involved in collaboration projects (see below).

Library software used
The department runs sophisticated library management software. The product used is Millennium software from Innovative Interfaces (a US company). The product is web-based, Java powered, and is one of the world leaders in specialist library software. Details are available on the company web site: http://www.iii.com/

Online access to library holdings is available for onshore or offshore staff and is also available to the public via the LINK connection.

While the collections are visible to all users and the public, Millennium also has circulation and acquisition functions that are only deployed to staff in the library teams.

Overseas listings are visible under each mission library holding. It is also possible to search across all libraries. The search tool is quite powerful and allows searching by a number of criteria: title; author; subject (using Canadiana, Répertoire des vedettes matières and US Library of Congress subject headings); call number; and keywords.

The software is multilingual and therefore allows holdings of the library in Tokyo to be listed using Japanese scripts.

The software is also capable of working with scanners and can produce machine readable codes of library holdings.

Research databases – the "Virtual Library"
The main research tool available to all staff is the Virtual Library. This reaches all DFAIT Canada staff via the Intranet link. On the Virtual Library are over 120 databases – a mixture of subscription-based and free resources. All staff can access all databases. This is not available at present to external users.

All databases are accessed via one platform – everyone has licence cover. Bandwidth was an issue when the service was rolled out, but the system is now using a CITRIX environment. http://www.citrix.com/ This has enabled the service to reach even the small 'micro missions' with no access problems. The fact that the service is available to all staff in all locations is a major selling point.

The databases are arranged in logical groupings. A focus group was established to work with users, to identify sensible groupings and make a logical arrangement in folders. The scope of the DFAIT Canada work mandate is so wide, that the list of databases is very large – but many staff only access four or five databases, and do not need to be proficient or trained in all databases.

Media clippings are a source used by many staff.

Factiva, an aggregator of news and business information is one of the more frequently used databases (http://factiva.com/).

Canadian news stories are also important and a comprehensive database is made available to staff through INFOMART (http://www.fpinfomart.ca/). As Canada is a bilingual nation, there is also access to a French news service aggregator, CEDROM-SNi, (http://www.cedrom-sni.com).

Another useful grouping is trade statistics – using WTA (http://www.gtis.com/), and other sites such as Canada Statistics. The WTA holds export/import data on Canada's 30 major trade partners.

Country information is grouped in another series and covers reports such as those from the EIU. (http://www.eiu.com/)

There is a section covering specialist dictionaries and general dictionaries.

Strategic analysis tools are covered by sites such as Oxford Analytica (http://www.oxan.com/), the Crisis Group (http://www.crisisgroup.org/) and Janes. (http://www.janes.com/)

By putting these tools in the hands of offshore staff, trade commissioners have largely become self sufficient in their research needs. This is a big time and cost saver for the department.

Staff are also able to use media monitoring trackers to keep them up to date with their areas of specialist interest.

If users are having difficulty accessing a site they can email the library directly for assistance.

Copyright and licensing is an ongoing issue. Staff need to be trained and frequently reminded of their copyright responsibilities, as the reuse of much of the information in the databases is constrained by copyright. Portfolio librarians have the responsibility of covering off copyright and licensing issues during training.

Portfolio librarians train staff in how to maximise the benefits of the research tools.

Trade Research Group
In addition to the library, there is a specialist in-house research team, the Trade Research Group. They take information from the library and databases and incorporate it into reports. They undertake work in Canada on behalf of the offshore network.

Administration
There is considerable administrative effort behind the Virtual Library to ensure that it works for staff – technical effort is needed to ensure that links work well from the platform, and ongoing administration is required to maintain and finance the extensive database subscriptions.

Widening the audience of the Virtual Library
The department has received additional funding from the Government of Canada to study the feasibility of widening the audience of the Virtual Library to cover other government departments that are also interested in international affairs and international trade. This is part of the Government's policy to ensure that there is a unified government approach to policy formulation. Other agencies will probably have to come on-board a Citrix platform to gain access.

Staff from other government departments such as Immigration and Development who are posted in Canadian Missions abroad are able to access the Virtual Library as there is a common technology platform installed.

There is potentially a large saving to the department in having a common platform if a consortia approach is used in paying for access to the databases. The cost of accessing so many databases is high, and as more and more information goes online, there is an increasing demand being made on the research tool budget.

The library staff are also at the forefront on the departmental collaboration project.

REFLECTIONS

Access
Access to all staff anywhere in the system has been a real advantage of the Virtual Library. Staff are immediately able to access databases, as and when they need them. However, there is a need to provide ongoing training for staff in how to effectively use the research tools. Without the training provided, the decision to deploy tools to all staff could have been an expensive failure.

Bandwidth was an issue at the start of the project and was largely addressed. This had the potential to derail the project, but Citrix seems to have answered many of the bandwidth issues.

Training
As well as providing training to staff, the library staff themselves have considerably up-skilled throughout the process and the introduction of portfolio librarians has been important in this process.

Consortia arrangements
A consortia approach to buying databases may be useful in leveraging purchasing power - TPOs and EDAs in member economies could share experiences on how best to negotiate consortia arrangements.

Library Management software
Library Management software (ELMS) is important for managing libraries in an electronic age, especially when holdings of material can be in one of a number of libraries. Document Management Systems do not normally have the ability to double as ELMS. There are considerable knowledge sharing benefits to a widely spaced organisation to have a central ELMS and to have this available to all staff via the Intranet.

Copyright issues
Copyright seems to be an ongoing issue – when resources were centralised via the library or a central research team, it was easier to measure compliance. A regular programme of staff training and updates needs to be in place to ensure that arrangements are not breached.

Case Study – Hong Kong

BACKGROUND

The Hong Kong Trade Development Council (HKTDC) has an impressive information service that has both a strong physical and online presence.

Named the TDC Business InfoCentre, its brochure states it is 'the world-class business information hub of Hong Kong'. The InfoCentre houses more than 40,000 titles of books, 8,000 periodicals, 500 statistical tables, 160,000 newspaper clippings, more than 60 electronic databases, numerous videos and according to its brochure "much more".

> *The TDC Business InfoCentre located in the Hong Kong Convention and Exhibition Centre extension, marks TDC's commitment to providing quality business information services to Hong Kong companies, especially to small and medium-sized enterprises (SMEs). The TDC Business InfoCentre is the most resourceful business information centre in Hong Kong. Used by over 13,000 visitors per month, the Business InfoCentre is rich in content and modern and hi-tech in facilities.*

KEY FEATURES

Physical Facility
The Centre occupies over 1,500sq meters and is showcased as the most resourceful business information centre in Hong Kong with a stunning view across Victoria Harbour.

The facility contains:

- Business facilities – photocopiers, printers, workstations to plug your own laptop into, telephones, personal computers and a TV and VCR
- Dedicated China Trade & Investment Resource Centre – business contacts, yellow and white pages, product directories, tariffs and taxes, business projects, newspapers and magazines, investments, WTO information, market intelligence, industry reports, laws and regulations, and statistical yearbooks
- SME Collection – it aims to provide small and medium-sized enterprises with both practical business techniques and theoretical business knowledge
- Hong Kong Collection – statistical data, annual reports etc
- Country and Regional Collection – economic, trade, investment, import/export, tariff and tax information
- Product and Service Industries Collection – import/export information, statistical data, facts and product design etc
- Clippings Collection - every day, TDC economists select a wide range of business-related news information for their clippings collection

- Statistics – a collection of global, regional and country statistical data on a variety of topics

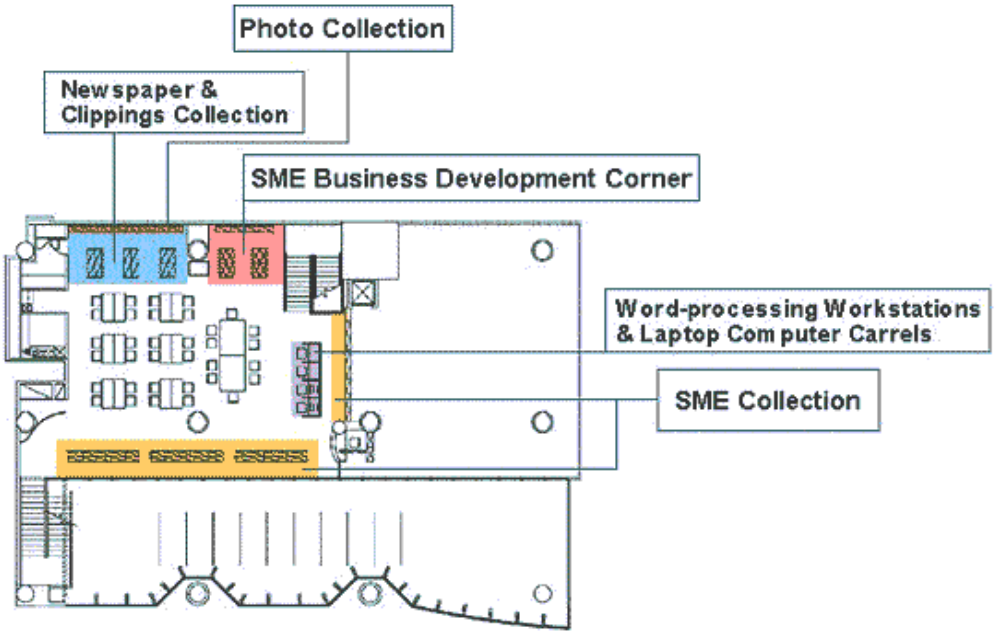
- Creative Industries Collection – specific information for creative industries, including fashion forecasts, magazines, periodicals, reference books and electronic resources like videotapes

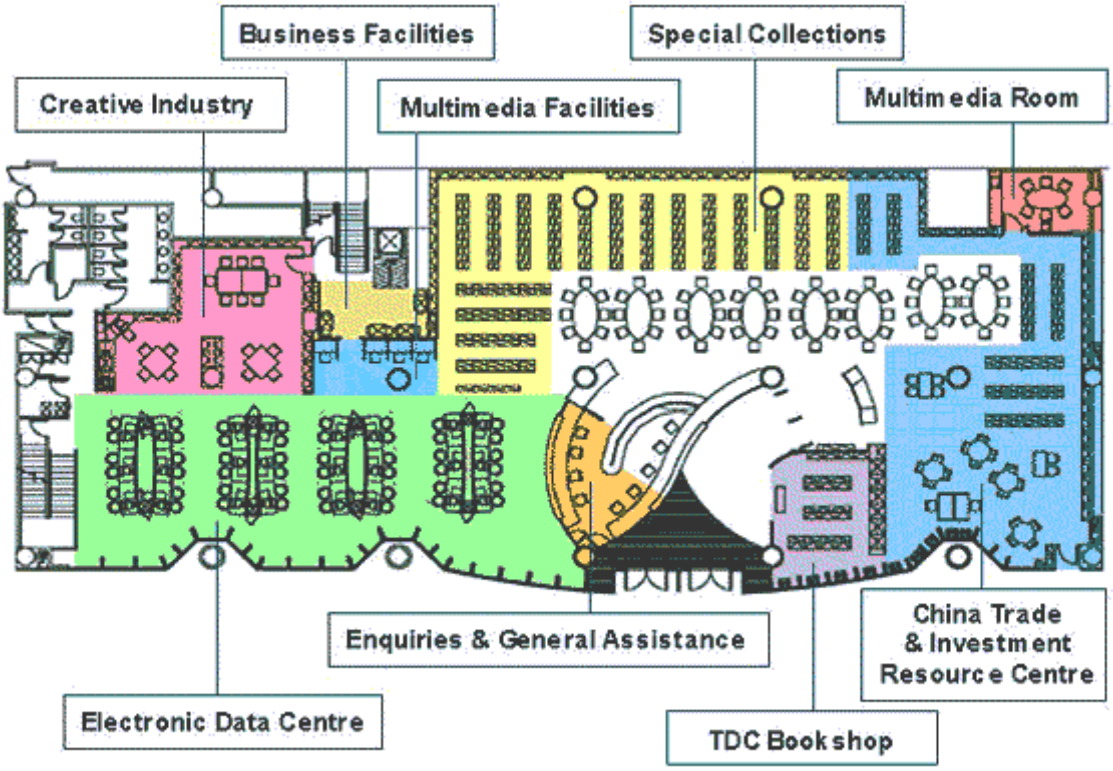
- Periodicals and Newspapers – there are over 2,000 local and international periodical and newspaper titles, providing SMEs with up to date information and the latest developments in various industries. In addition there is a collection of over 3,400 electronic journals and magazines containing millions of articles

- TDC Bookshop – (detailed below)

- Access to online and electronic databases enabling users to search more than 60 databases with free internet access. A list of databases can be found at http://infocentre.tdctrade.com/electronic/index.htm

Staff are available to assist members of the public with their information requirements.





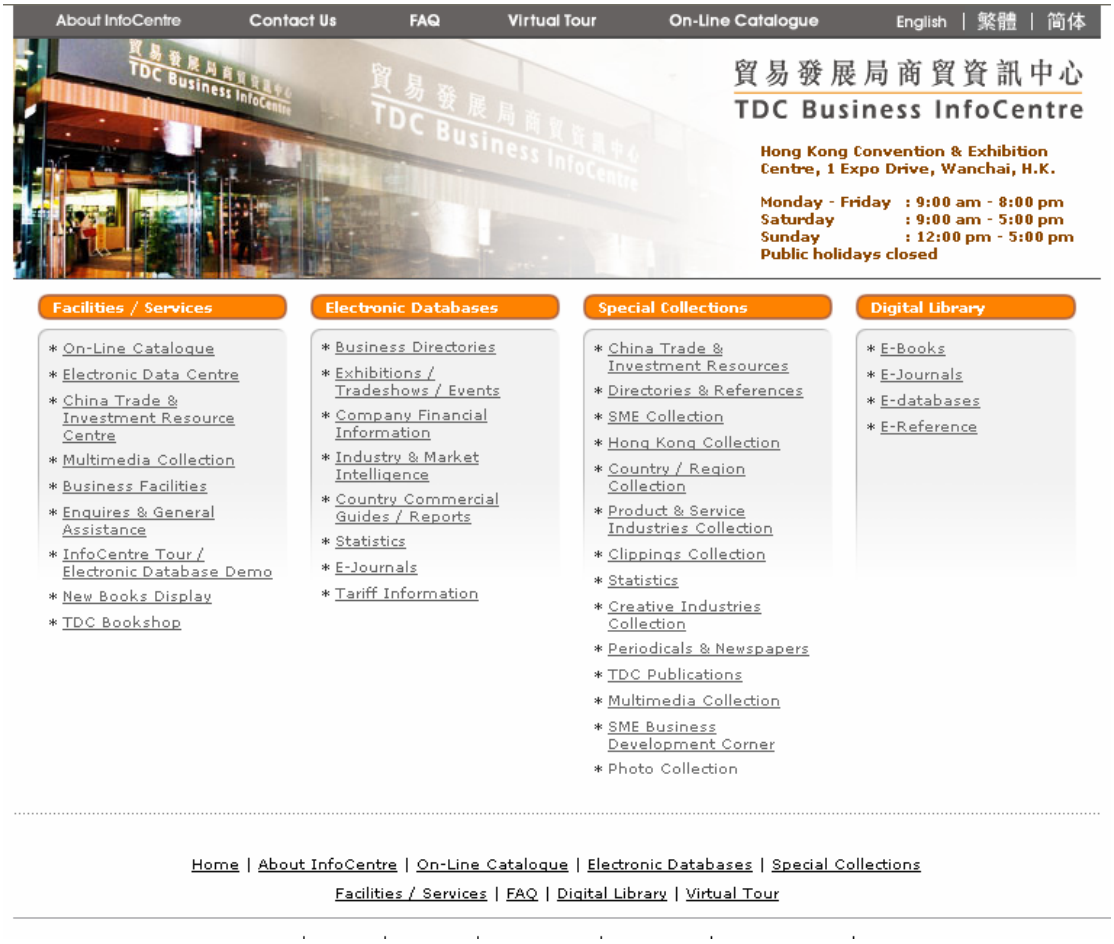
Online facility
TDC's online window to the Business InfoCentre can be found at (http://infocentre.tdctrade.com/about/index.htm).

In addition to providing an overview of the type of information available at the Business InfoCentre, users can access the following databases and collections:

- Online catalogue – search by title, subject, keywords, author, call number, new book list and the e-books collection

- Digital library – access to e-books, e-journals, e-databases and e-reference material

The web site also provides a virtual tour of the Business InfoCentre in either English or Cantonese.



TDC Bookshop
The TDC bookshop boasts a large selection of TDC publications including trade magazines and market research http://bookshop.tdctrade.com/.

Users can purchase material directly from the web site, search by publication date, and sign up for 'Traders Club'.

For an annual subscription fee, Traders Club gives members quick access to global trade information, discounts for purchasing publications, the ability to download publications online and subscriptions to market publications and newsletters.

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Spain: Star of the EU Market

'Going Out' via Hong Kong: Mainland Enterprises Fast Track to the International Market

A Revisit of US Trade Measures and their Implications for Hong Kong Exporters

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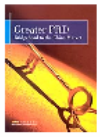
Best Sellers

Guide to Doing Business in China 2004/05 Edition
Language : English, Chinese
Price: HK$228 / US$48
Review: The 2004/05 edition provides the latest, the most comprehensive and wanted practical information on policies, procedures, rules and regulations on conducting business in China.
Full Details

Essentials of China's Foreign Taxation 2004 Edition
Language : Chinese
Price: HK$100 / US$13
Review: This practical guidebook gives a detailed description of all types of foreign-related taxes levied by the Chinese authority, covering tax items and rates, calculation methods, rules on exemptions and reductions, dates and locations of tax payment, as well as relevant laws and regulations.
Full Details



Greater PRD - Bridgehead to the China Market
Language : English, Chinese
Price: HK$100 / US$13
Review: China market has been the focus of most multinational companies in recent years. Due to its strengths in sourcing, distribution, processing and image building, the Greater PRD is undoubtedly an important platform for foreign companies to penetrate the China market.
Full Details

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Forthcoming Titles

- None...

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「中國營商指南」2004/05年 訂版

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- HK Enterprise
- HK Electronics
- Hong Kong Gifts, Premiums and Stationery
- HK Toys
- HK Apparel
- HK Watches & Clocks
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- Business Alert - EU
- Business Alert - US

Related TDC Services

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香港貿易發展局 Hong Kong Trade Development Council

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REFLECTIONS

The HKTDC's TDC Business InfoCentre is an impressive physical and online service. The InfoCentre itself has sweeping views across the harbour, and is a bustling, fully functional library.

Customers frequently use not only the free Internet service, but all other services available. HKTDC staff are also available to assist with any queries customers might have.

The collection of books, publications and reports available is also substantial.

Intranets and Portals

Overview

The majority (94.7%) of respondents have implemented an Intranet.

Have you implemented an Intranet within your organisation?

Answer	Number	% of Total
Have implemented	18	94.7%
Are planning to implement	0	0.0%
Are not planning to implement	1	5.3%

Most respondents that have implemented an Intranet did so between three and five years ago (35.3%).

When did you first implement an Intranet?

Answer	Number	% of Total
<1 year ago	1	5.9%
1-2 years ago	1	5.9%
2-3 years ago	2	11.8%
3-5 years ago	6	35.3%
>5 years	7	41.2%

The Intranet is managed by the following staff:

Manager, eCommerce. (Australia)

Integration, Partnering and Application Services Division. (Canada)

Head of Informatic Department- Manager of System Developping Department. (Chile)

Division for Computer Network Management, Department of Information, CCPIT. (China)

IT; corporate communication Dept. (Hong Kong)

Information Systems Division. (Japan)

The Office of the Chief Information Officer. (US)

Mr. Pham Viet Duc, an expert in Information and E-commerce Dept. (Vietnam)

KM Team. (New Zealand)

The application manager of Information Technology team. (Korea)

Specialist. (Taiwan)

Department of IT and Statistics (Oficina General de Informática y Estadística) Enrique Garrido-Lecca, head Nora Tejeda, head of Departament of IT Waldy Bejarano, official of Economic Searching Department (Oficina General de Estudios Economicos). (Peru)

One of the MEDT departments, all other departments are responsible to update the information practically every day. (Russia)

In terms of the maintenance of the intranet, we have an area that is responsible for the systems of the institution. Intranet has different sections, each section looks after their content. For example the Department of Human Resources is responsible for updating the content about Human Resources. (Mexico)

Director of Information and Export Training. (Indonesia)

International Trade Information Center. (Thailand)

Services Unit of Ministry of Industry and Primary Resources, Assistant Directors of Management and Finance. (Brunei)

Training on how to use the Intranet is carried out by:

Not required. (Australia)

Integration, Partnering and Application Services Division & Canadian Foreign Service Institute. (Canada)

Head of Informatic Department- Manager of System Developping Department. (Chile)

Division for Computer Network Management, Department of Information, CCPIT. (China)

No need for training, the webpage is very user-friendly. (Hong Kong)

Information Systems Division. (Japan)

A three person group does all the worldwide training on the intranet. (US)

Mr. Pham Viet Duc, an expert in Information and E-commerce Dept. (Vietnam)

Mainly the KM team. (New Zealand)

The application manager of Information Technology team. (Korea)

Specialist. (Taiwan)

1) *Department of IT and Statistics 2) Department of Economic Searching. (Peru)*

The MEDT department responsible for Intranet function. (Russia)

No not really. At the beginning yes. Nowadays every person navigates through the system and get the information they want. (Mexico)

Director of Information and Export Training. (Indonesia)

International Trade Information Center. (Thailand)

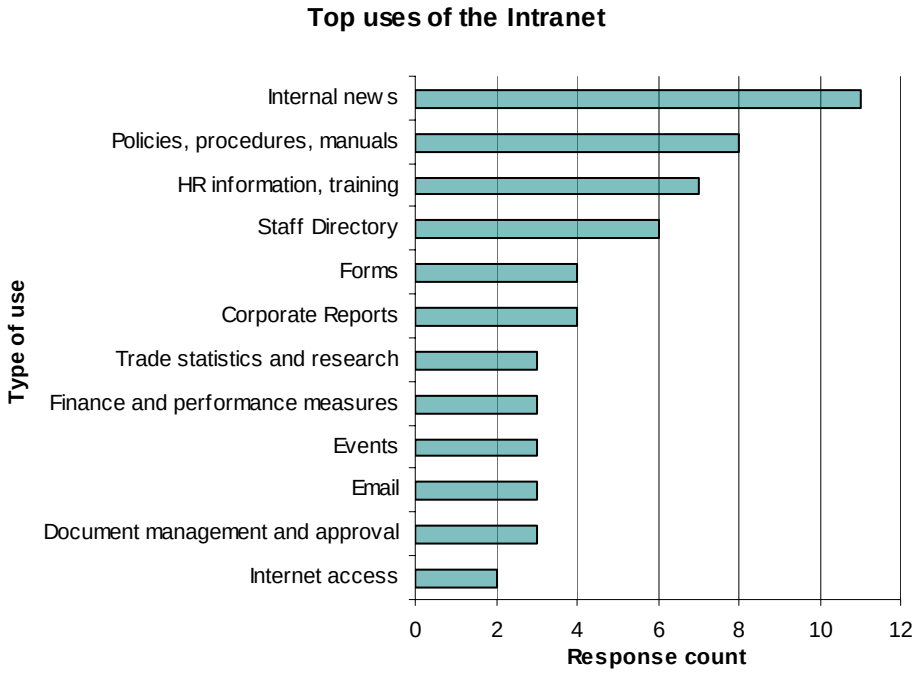
Outsourcing. (Brunei)

Most (82.4%) Intranets are accessible from both onshore and offshore.

Is your Intranet accessible from both onshore and offshore?

Answer	Number	% of Total
Onshore only	3	17.6%
Offshore only	0	0.0%
Onshore AND offshore	14	82.4%

Respondents were asked to list the top five reasons their Intranet was used. The chart below shows that internal news was the most popular reason.



Case Study – Mexico

BACKGROUND

Bancomext is quite unlike the other TPOs and EDAs that are subjects of this study, even though the aims of Bancomext are similar to those of most TPOs (assisting Mexican companies, especially SME's to export, and attracting foreign investment). Bancomext is primarily an export bank, which assists companies mainly through export financing, but also through traditional TPO methods such as training in export and providing access to overseas specialists via a trade commissioner service.

Bancomext does not receive state funding for export promotion activities – export promotion activities are either paid for by the exporter, or they are supported by the profitable supply of export financing to companies. Bancomext provided over US$4 billion of export credits to Mexican companies in the period 2000-2004. This is equivalent to about 20% of the export credits advanced to the Mexican export sector.

This slightly different background to the organisation gives a different feel to its knowledge policies. There is great emphasis on web delivery of services where possible, and on keeping the web site very updated.

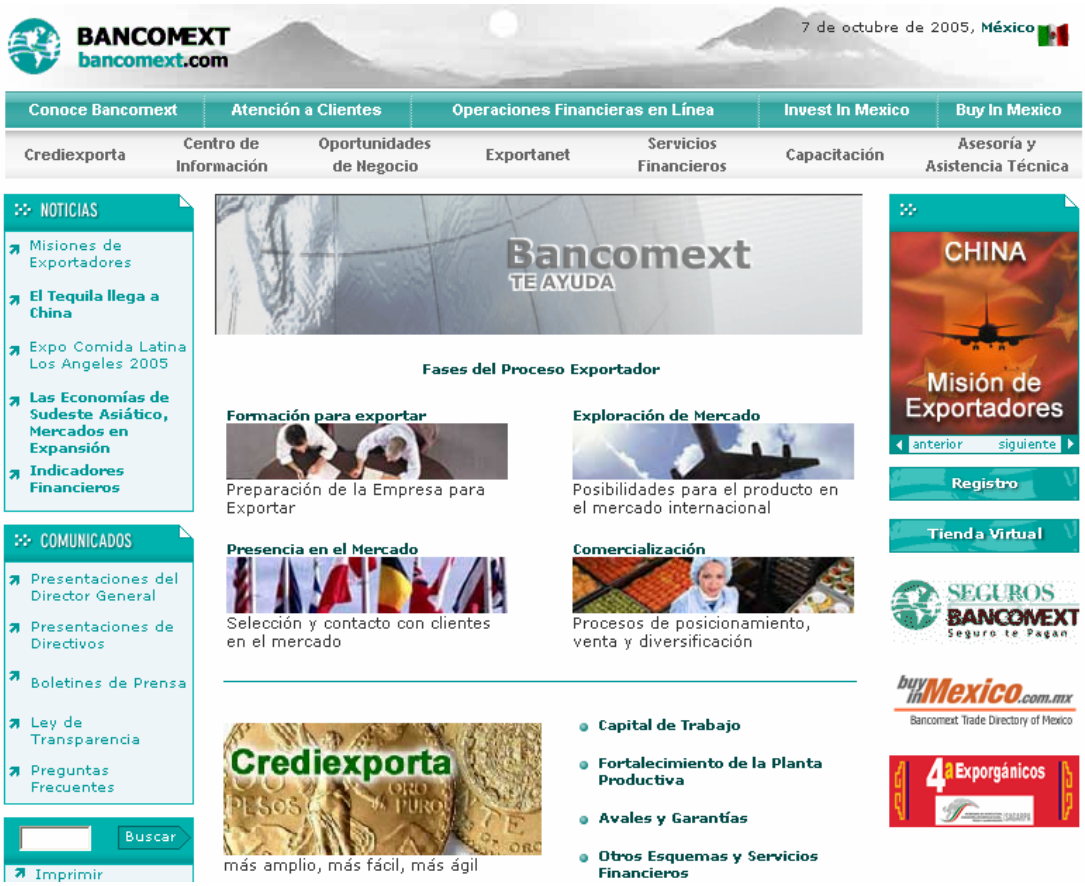
Although working with nearly 12,000 Mexican exporters, Bancomext has only 31 overseas offices, and 25 offices in Mexico. Without efficient web services, and an export hotline, the organisation could become overwhelmed.

In 2004, the export hotline phone service took 2.7 million calls, and the Internet Portal received 14 million hits (a 10% increase on 2003).

KEY FEATURES

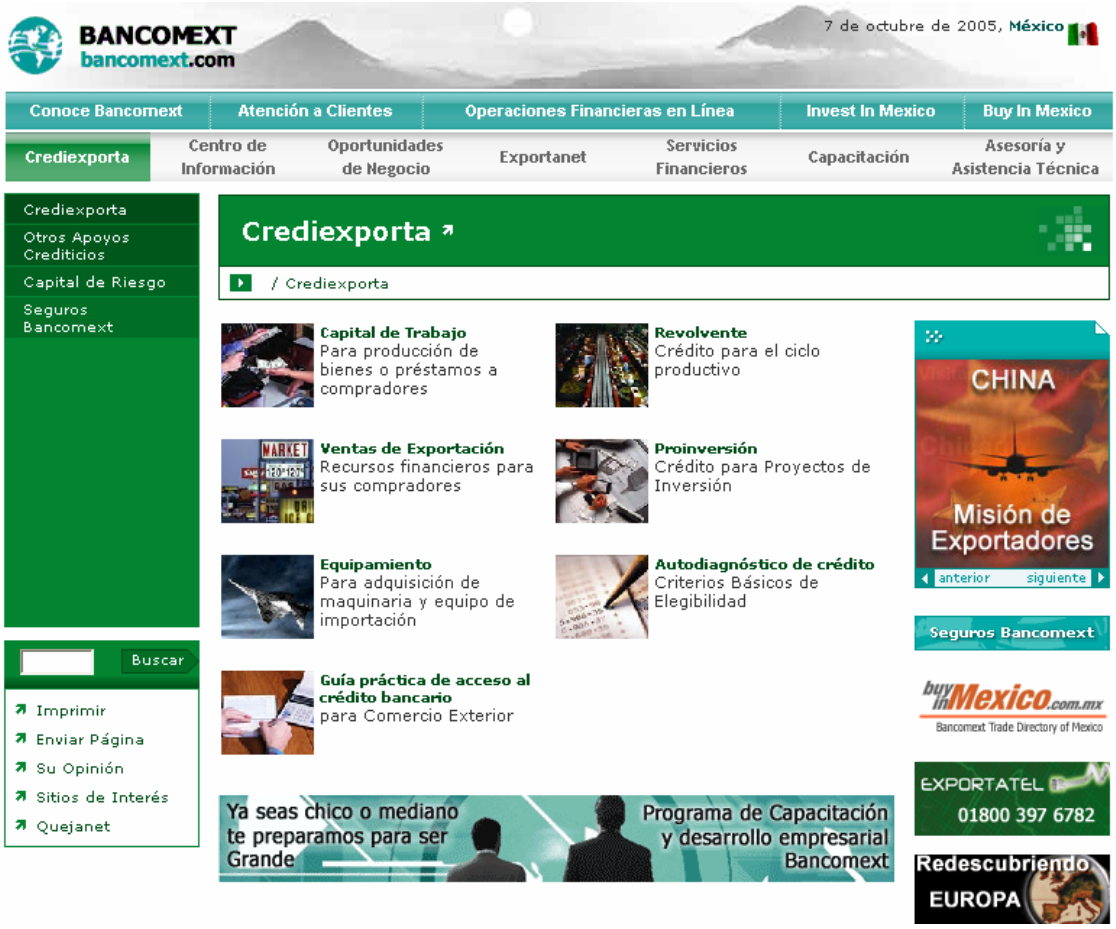
The Bancomext Portal
The front page of the Portal is well laid out, featuring an eye-catching calendar of trade events for the current month, with events being scrolled across the calendar. Navigation buttons under the headings training, market investigation, market presence, commercialisation and credit export take the exporter to the part of the site that they need.

There are also links to topics of hot interest to exporters, such as the "China" information button.



Credit export information

The credit export function gives information on capital, export finance, revolving credit and investment, and provides a self-check guide for companies wanting to access finance.

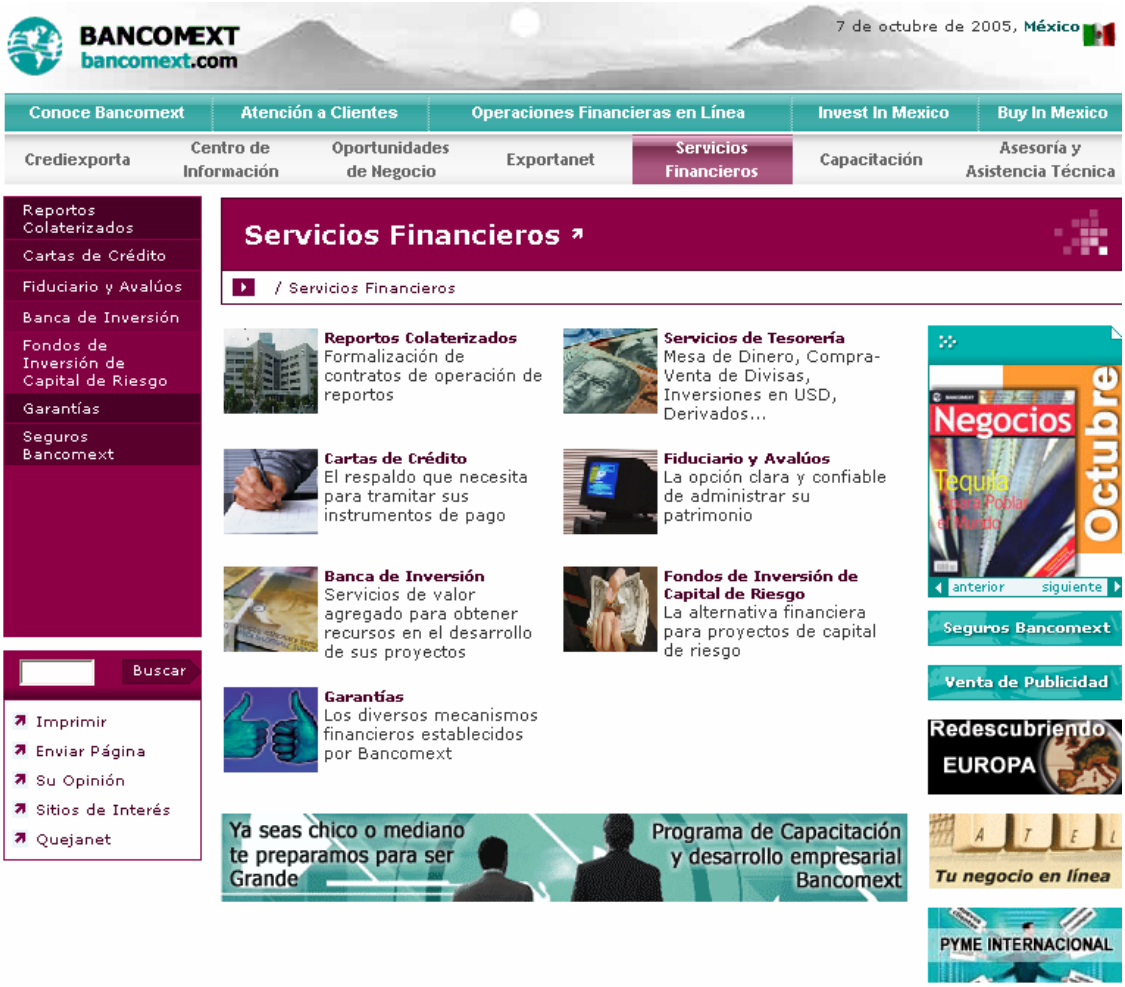


Centre for Information

The Centre for Information links together all the standard sources of information available to exporters – an export directory, a "How to Export" guide, a calendar of events, reports on markets and sectors, two Bancomext international trade magazines, statistics, country guides and weekly reports. The aim is to give as much information as possible to companies, and make it easy to access.

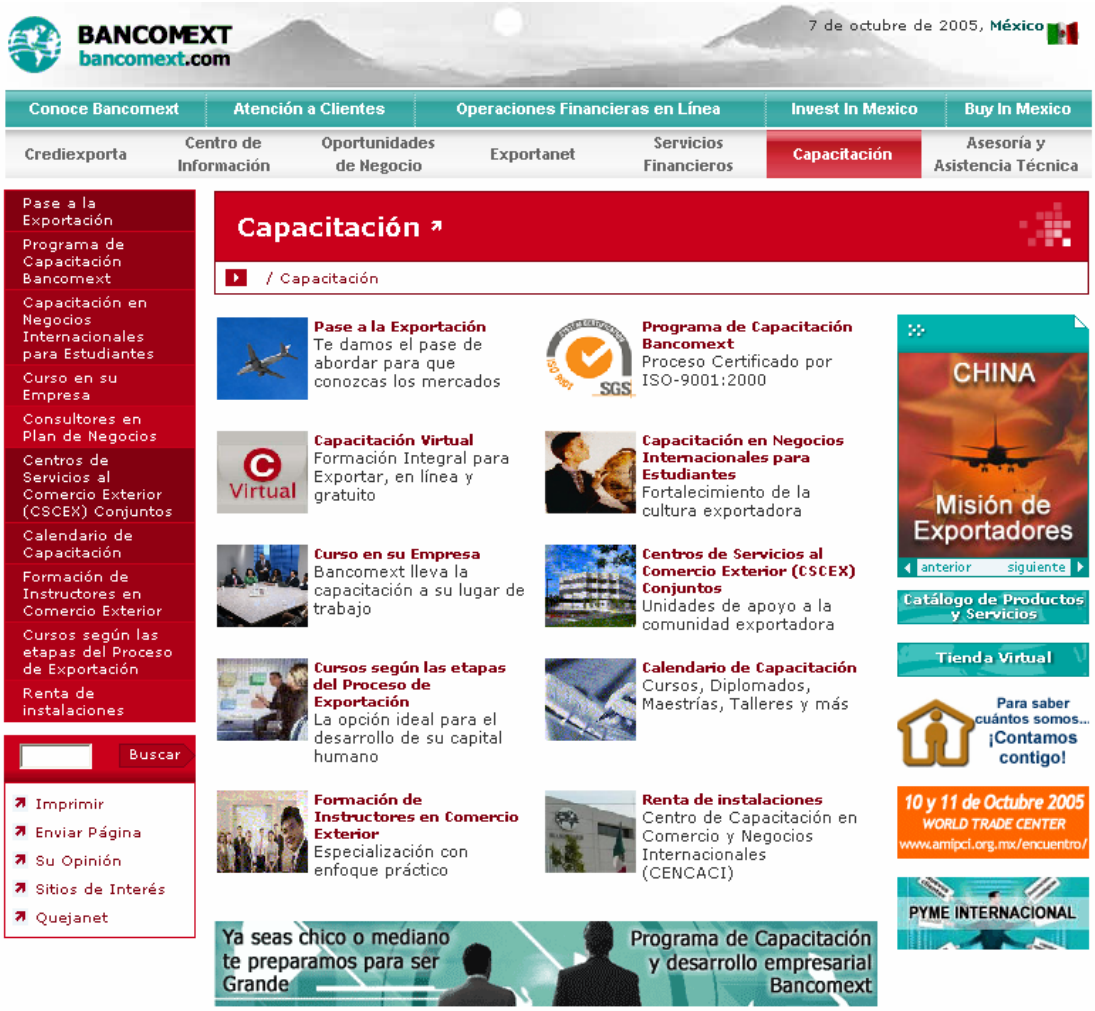
Financial Services

The Financial Services section gives online access for companies wanting to apply for a letter of credit, treasury services, investment capital, risk capital, or export guarantees.



Training

The Training section has information on export courses that Bancomext is running – both short courses and university courses. It is also possible to have training delivered in-house by Bancomext trainers.



The Bancomext Trade Portal is a one stop shop for exporters. Most information on the site is available free of charge to Mexican companies, but some reports are sold through the online shop (Expotienda) and the site has credit card facilities.

The staff Intranet

Bancomext has placed strong emphasis on developing an Internet Portal, and equal thought has also been given to constructing an Intranet that is engaging to staff and educative.

When staff Intranet usage was measured, the most common use was the internal phone directory. Bancomext felt that the Intranet could be used much more constructively than this, and it therefore placed the phone directory link towards the bottom of the main page. Staff now have to scroll through the main page to reach the phone directory.

At the top of the screen are a link to the CEO's message (which is frequently updated), and "Faces of Bancomext", photographs of staff in social settings such as Bancomext events, which help build the Bancomext corporate community more effectively than only seeing standard photographs on the phone directory link.

Staff can also access the bank's strategic plan and a link to the external bank Portal on the front page.

As the bank is a commercial enterprise, the Intranet is sponsored by companies who make offers available to Bancomext staff. This is very popular with staff and ensures that they return to the site frequently.

Staff training

There is considerable emphasis on training staff on information available on the Internet Portal. There is a section on the Intranet called “Know Your Portal” which has short details and links to pages on the Internet Portal that are new or updated.

Continual improvement of the Intranet

In all sections of the Intranet, staff are encouraged to send in feedback to the Intranet manager, via a link to an email form. These comments are very useful in the process of continual improvement of the Intranet. There is a process of gauging staff opinion through the use of Bancomext forums (online forums) and mini polls of staff.

Online magazine

There is also an online magazine called Tabex which is the main means of communication among the Bancomext community. Tabex has standard staff notices, but also employee of the month awards, letters written by employees, notices of social events, and a knowledge trivia quiz. The aim is to make it a fun place to come for news.

Within the larger offices, there are notice boards that mirror information that is found in Tabex.

REFLECTIONS

Keeping the Portal up-to-date

When Mexican exporters open the Internet Portal, they can immediately read relevant “News” at the top of the home page and also register for major events. Although information on second level pages does not need to change frequently, the homepage should be dynamic and key, with current information highlighted.

Valuable information for staff training

While staff may be very familiar with the Intranet that they use on a daily basis, they may not be aware of the information sitting on the corporate Internet site. This information is often very useful and important for the professional development of staff. The “know your Internet” feature on the Bancomext Intranet is an attempt to bridge this issue.

Continued improvement

A corporate Intranet should be subject to continuous review and improvement and small changes should be possible without significant disruption or the need for IT intervention. Bancomext are reinforcing the relevance of the Intranet to staff and ensuring constant improvement by actively seeking feedback via the Intranet. Of course implicit in any strategy to seek feedback is to have a process to handle the feedback, to prioritise the suggestions and to adequately resource the Intranet team to allow them to make the necessary changes.

Case Study – Thailand

BACKGROUND

The Prime Minister Operation Center (PMOC) is a national project in Thailand initiated by the Prime Minister to channel information flow from Thailand's Ministries. It is a web-based information system that aims to provide up to date, accurate and clear information to the Prime Minister, Deputy Prime Ministers and high-ranking officials.

Each Ministry has been instructed to set up a filtering system for sending information to their Minister. Thailand's Ministry of Commerce was the first Ministry to complete its portal, which was launched in January 2005.

KEY FEATURES

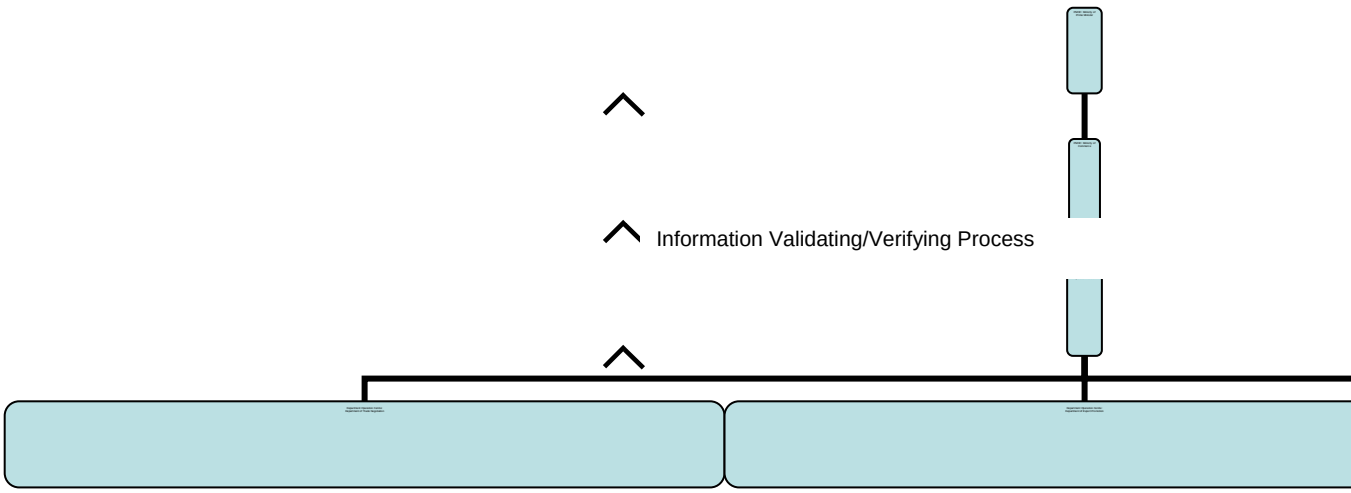
The key features and structure of the PMOC are highly confidential. However, the Department of Export Promotion was able to supply the high level overview which follows.

The integrated information is divided into three main categories according to National Policy:

- Economics
- Tourism
- Agricultural aspects

From a top-down point of view, the Prime Minister or government executives are able to direct the ministries and to track progression via the system.

From a bottom-up point of view, organisations under the ministries are able to report significant news or urgent issues to the national executive level. The structure of the information system follows:



The Ministry of Commerce feeds information into the PMOC structured around the following areas:

- News
- Ministry structure, finance and strategy
- Performance measures
- International trade – export, import, FTA, WTO, domestic trade, business development etc
- Hot projects and priorities
- Early warnings – trade, commerce, policy changes in other countries that will affect trade

REFLECTIONS

The PMOC is an interesting case study of an inter-governmental portal. It addresses 'information overload' and streamlines real time information where it is needed.

The PMOC operates as in information nerve center allowing the Prime Minister and other senior officials direct access to the most up to date information.

Collaborative Tools

Overview

Eleven respondents (57.9%) stated that they have implemented tools that specifically enable collaboration.

Have you implemented any tools that specifically enable collaboration within your organisation and with external parties?

Answer	Number	% of Total
Have implemented	11	57.9%
Are planning to implement	4	21.1%
Are not planning to implement	4	21.1%

Examples of collaboration tools include:

A Community of Practice pilot is running with two departmental groups that will allow both of them to extend their existing communities by enabling them to collaborate within a virtual environment. One community is comprised of departmental staff only, and the other is comprised of departmental staff, other government departments, non-governmental organizations, academics, and business leaders. (Canada)

Joint promotion event calendar - web-linkages. (Hong Kong0

Exchanging registered information on online-business matching program with KOTRA (Korea Trade Investment Promotion Agency). (Japan)

We use a knowledge management tool (expertise management) designed by Askme Corporation. It allows us to capture and reuse questions and answers, upload any kind of file for sharing, and collaborate in community spaces. (US)

1. iManage Worksite - shared DMS that can be used as a collaboration site for teams and projects. Can host threaded discussions, and be used to assign tasks||2. MarketNZ.com - website which incorporates news feeds specific to individual needs. (New Zealand)

Messenger : Real-time chatting, Online-conference room, Voice communication etc||- Cyber conference : Video conferencing, Real-time chatting etc - Online community : Notice, resource sharing room etc. (Korea)

The afore-said "Russia-China Economic Cooperation" Internet web-site. (Russia)

Local area network and intranet. (Indonesia)

Case Study – United States

BACKGROUND

The US Trade division of the Department of Commerce (DOC) employs 1,700 staff in its overseas trade unit. About 340 staff are based in the USA in many small offices. The US based part of the organisation was highly desegregated, and staff lacked specialist industry or market skills – their many small regional offices tended to be staffed by "generalists". To remedy this situation, DOC embarked on a three-year strategic plan, which was based on deepening specialisation, Knowledge Management and collaboration. As part of the Knowledge Management strategy, a single Client Management System and an integrated Document Management System are also being investigated, although these have not yet been launched. At present there are regionally established client databases, and no organisational Document Management System for sharing documents.

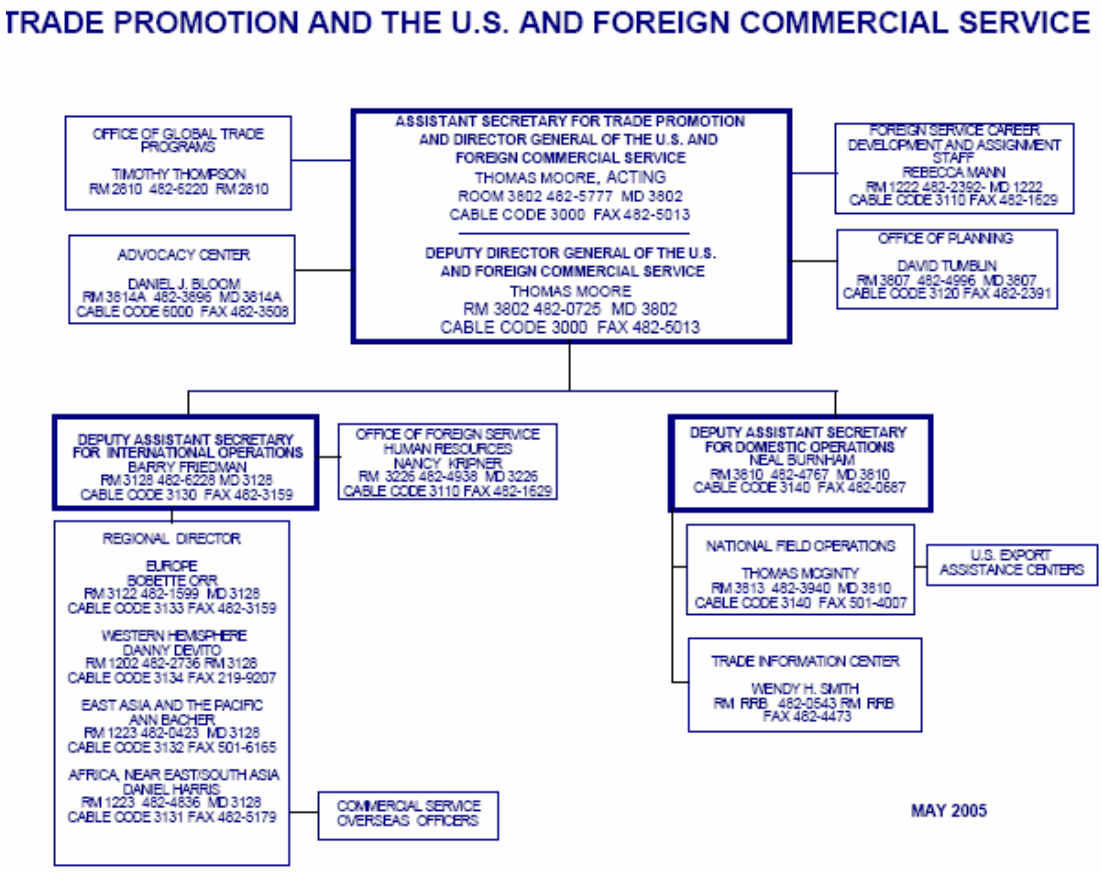
There was a need to up-skill the US client managers and give them professional development. The goal was to create 'sector specialists' who would work in horizontal industry focused teams such as 'agritechnology', rather then being geographically limited. The aim is to ultimately have about 50 specialists among the 340 locally engaged staff.

US Trade's mandate is primarily to assist SMEs. US Trade assists all companies who want to export, and works with other agencies such as the Small Business Agency and Import/Export Bank to provide consulting services to potential exporters. Larger multinational companies are often assisted, but may not need to consult with the domestic operation, and may go direct to the offshore network for assistance (from ambassadors and trade commissioners).

There are some interesting cultural issues in the organisation, with many offshore staff being locally engaged, and the US offshore seconded staff considered as "Foreign Service employees". These staff are attached to an offshore mission (usually an Embassy) and do not necessarily have the same goals as their onshore colleagues. They have different performance, promotion and review processes and are not integrated with the domestic service. There is a danger that they can get out of touch with developments onshore.

The domestic office has been struggling for relevancy, with US government agencies under strict budget reviews. Onshore client managers feel potentially under threat from improved delivery of services via the Internet, and the ability of onshore companies to contact the offshore system directly. They were also aware that companies felt that they did not have specialist knowledge and have therefore been keen to look at collaboration as a means of professional development. They see connecting to the network and professional development through knowledge sharing as the most powerful tools for adding value to their established consultancy services.

The organisational structure is as follows:



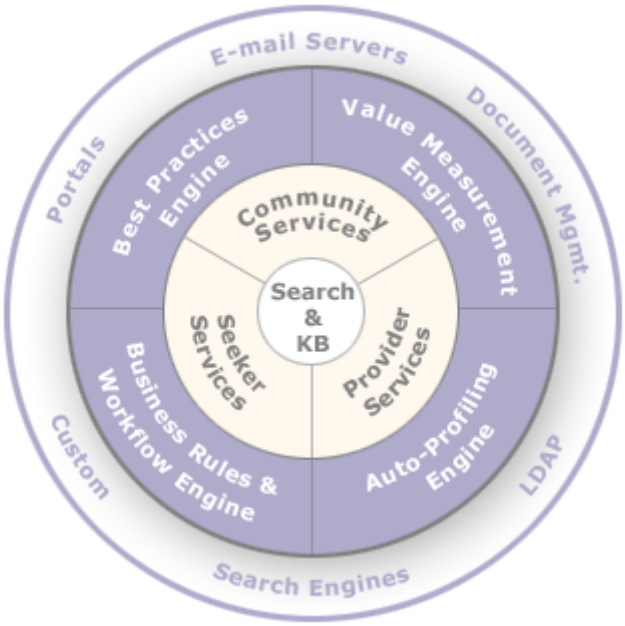
KEY FEATURES

Collaboration platform - AskMe

The collaboration platform chosen by the US Trade Promotion Service is AskMe Enterprise. This software is developed in Seattle by AskMe Corporation. Unlike traditional collaboration technologies that focus on improving access to documents, AskMe Enterprise provides companies with a comprehensive system that enables employees to not only locate and benefit from the documented knowledge within the organisation, but to also identify 'undocumented knowledge,' or the expertise and know-how of their colleagues. AskMe Enterprise provides a central resource of the most relevant and up to date information and employee expertise in the organisation. Employees are then empowered to make faster and more informed business decisions, avoid work redundancies and reduce project cycle times.

Capturing knowledge exchanges

By intelligently capturing each knowledge exchange that occurs between employees and storing all shared information in a knowledge-base, AskMe Enterprise enables companies to proactively mediate the growing epidemic of 'knowledge erosion' that naturally occurs when internal teams split and transition to new teams upon finishing critical projects, when the organisation is restructured or when employees retire or leave the organisation. AskMe has been used by many large multinational companies such as Procter & Gamble, Honeywell, Boeing and Gerber.



Benefits of a Knowledge Network
The key benefit of a Knowledge Network is the capability to capture tacit knowledge interactions and create a dynamic, constantly growing knowledge-base of solutions. This ensures that employees leverage past learnings and advancements, thereby avoiding reinvention. In addition to capturing information, AskMe Enterprise automatically ensures that this content stays fresh and the knowledge-base stays up to date.

Deployment of the software
Initially AskMe Enterprise was only an internal tool for US Trade staff. It has the capacity to work with outside parties, and Stage II will be to make the software available for companies outside the Trade department. In US Trade the AskMe software is called “DOC Insider”.

There was some initial reluctance by staff to put information into DOC Insider – the attitude was that if they put all their valued tacit knowledge into it, would staff then find that they were less needed for their expertise?

There was also less enthusiasm for DOC Insider in the offshore network. It was initially seen as a domestic tool to assist onshore staff in their professional development. A high level decision was made by the implementing team not to force the offshore offices to use DOC Insider, but to encourage and to sell the benefits of using the tool over time. Staff needed to realise that the organisation is basically a knowledge organisation, and needs to work together better to leverage knowledge for the benefit of companies.

Collaboration
Much of the work done by the offshore network is producing market sector reports for domestic consumption. Onshore staff felt that they were not able to have input into research directions. DOC Insider finally allows the onshore network to indicate areas of interest and concerns about research work, as onshore staff are able to use it to request that the offshore network put a particular piece of research into the pipeline, and the offshore teams can see what sort of demand is coming from the domestic operation.

Information exchange
One traditional area where the department was weak was on information about US capabilities that could be used by the offshore network. DOC Insider gives the offshore network the ability to signal what areas it needs assistance with.

Traditionally, if a domestic specialist received a question, they would send an email to an offshore post. The email would be replied to, but the knowledge transfer would not be captured and stored for future use. It was not possible to reuse the information and the transfer process could take a period of time.

In focus group work, it was realised that the DOC needed to supply deeper knowledge to clients. It also had to share information to enable it to concentrate on new work, and to be able to react more quickly to one off queries.

Communities of interest
DOC Insider was also designed to connect people and to create communities of interest within DOC.

A pilot was carried out in May 2003. The main roll-out took place in October 2004 and staff have been gradually trained since that date.

Usage
DOC Insider is being accepted quite readily, although not all users are ready to document their knowledge transfers. Reports are available on individual users and how often they have accessed DOC Insider. A deliberate decision was made not to KPI staff on the use of this tool, but to encourage staff to use it in a “hearts and minds” campaign.

Access
There have been problems with access into some offshore offices where there is a bandwidth problem. 75% of offices have a good connection. Offshore acceptance is more related to cultural acceptance than to a technology issue.

DOC Insider is accessed via the Intranet – there is also the need for a password moving from the Intranet to DOC Insider, which seems to cause some concern with staff. The home page is tailored to the individual. On their personal home page, staff can store key documents, and also perform an immediate search into DOC insider for knowledge held in the system.

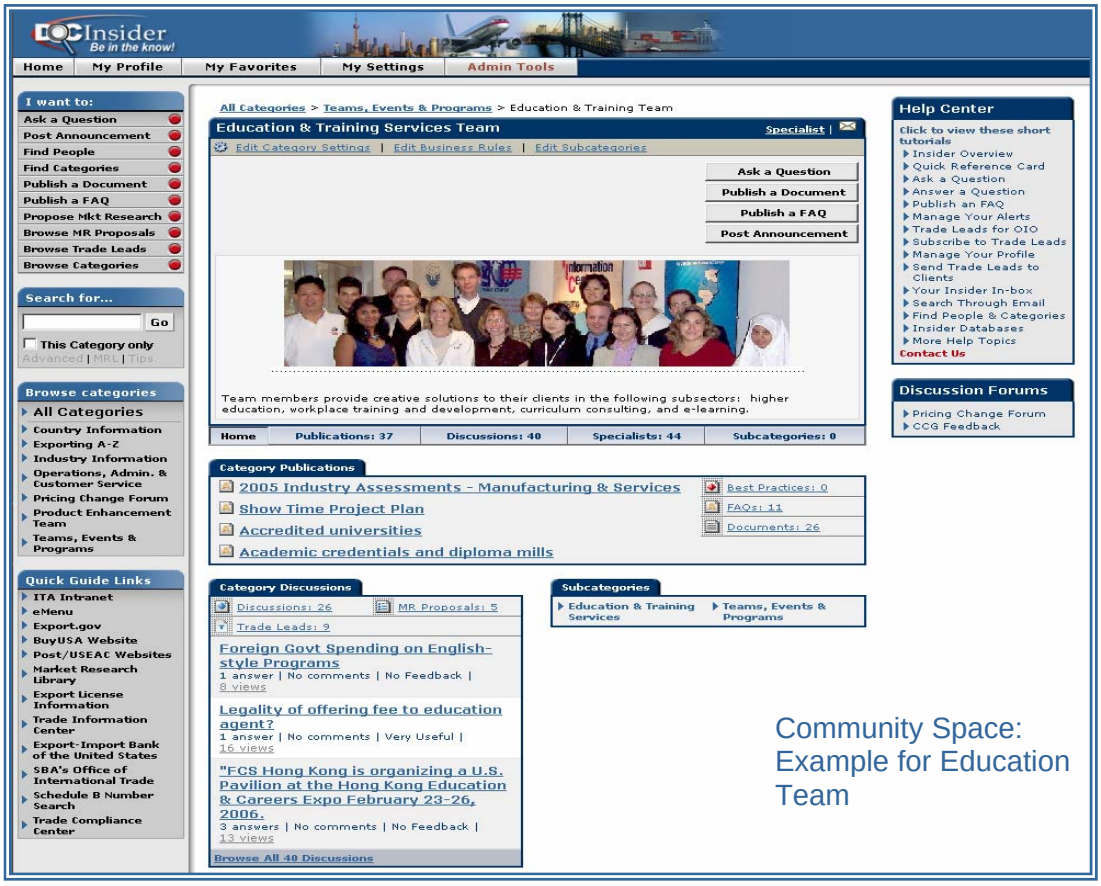
Homepage

Staff skills and expertise locator

As the tool is a complex skills and expertise locator, staff are encouraged to complete as much detail about their own background and skills areas on their personal profile as possible, including degree qualifications, work experience, and project experience. All these can help in searching for an expert using a keyword search.

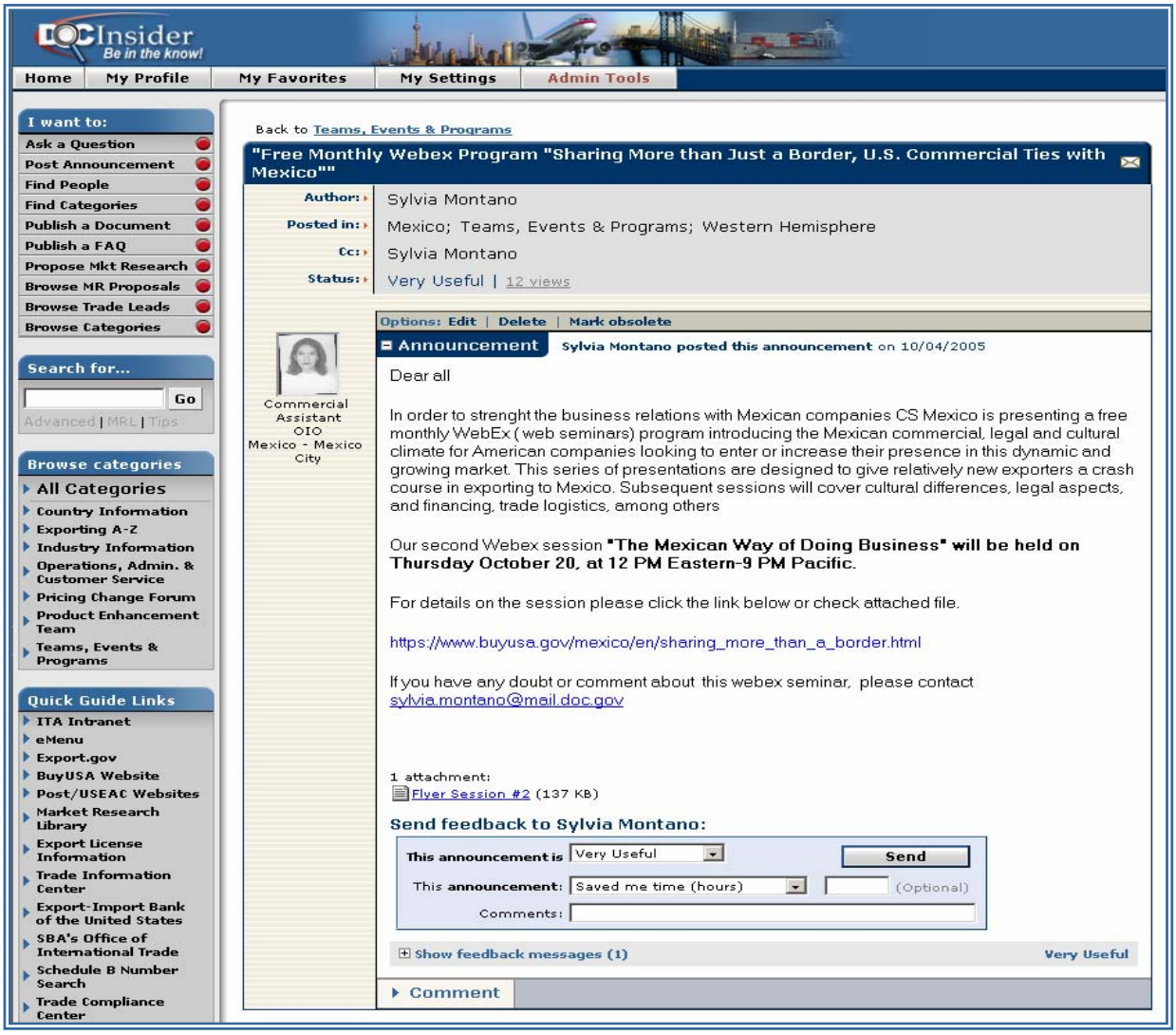
Team pages

As indicated, the team pages are a useful way to establish horizontal sector specialist teams across the globe. Below is an example of an Education Team page. Category publications (such as market reports) and category discussions can be accessed directly from this page by industry specialists.



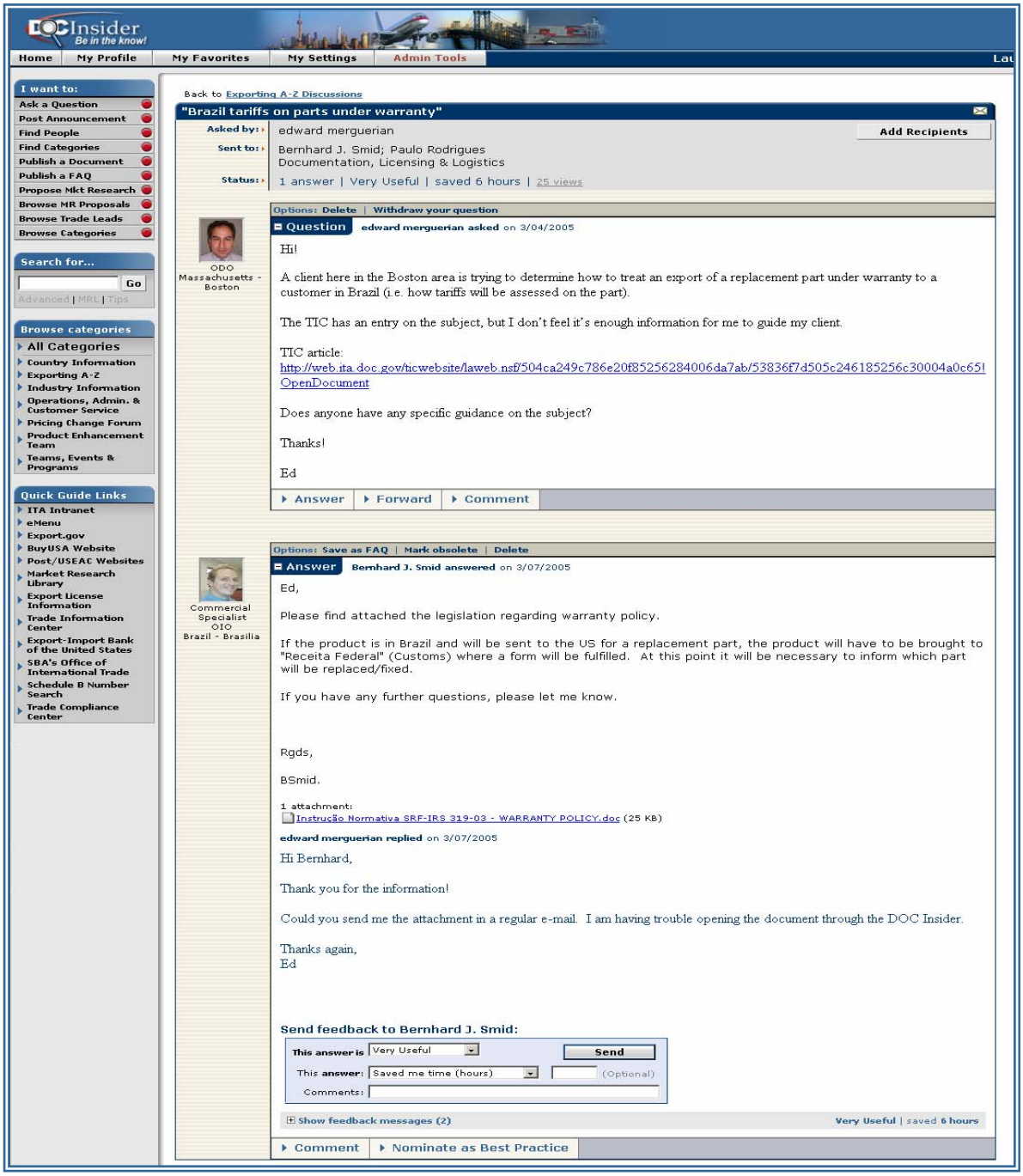
Announcements

Staff can use DOC Insider to make announcements about upcoming events or training opportunities for staff. A nice feature of the software is that there is scope for feedback on announcements – staff can rate whether an announcement was useful or not.



Questions and answers

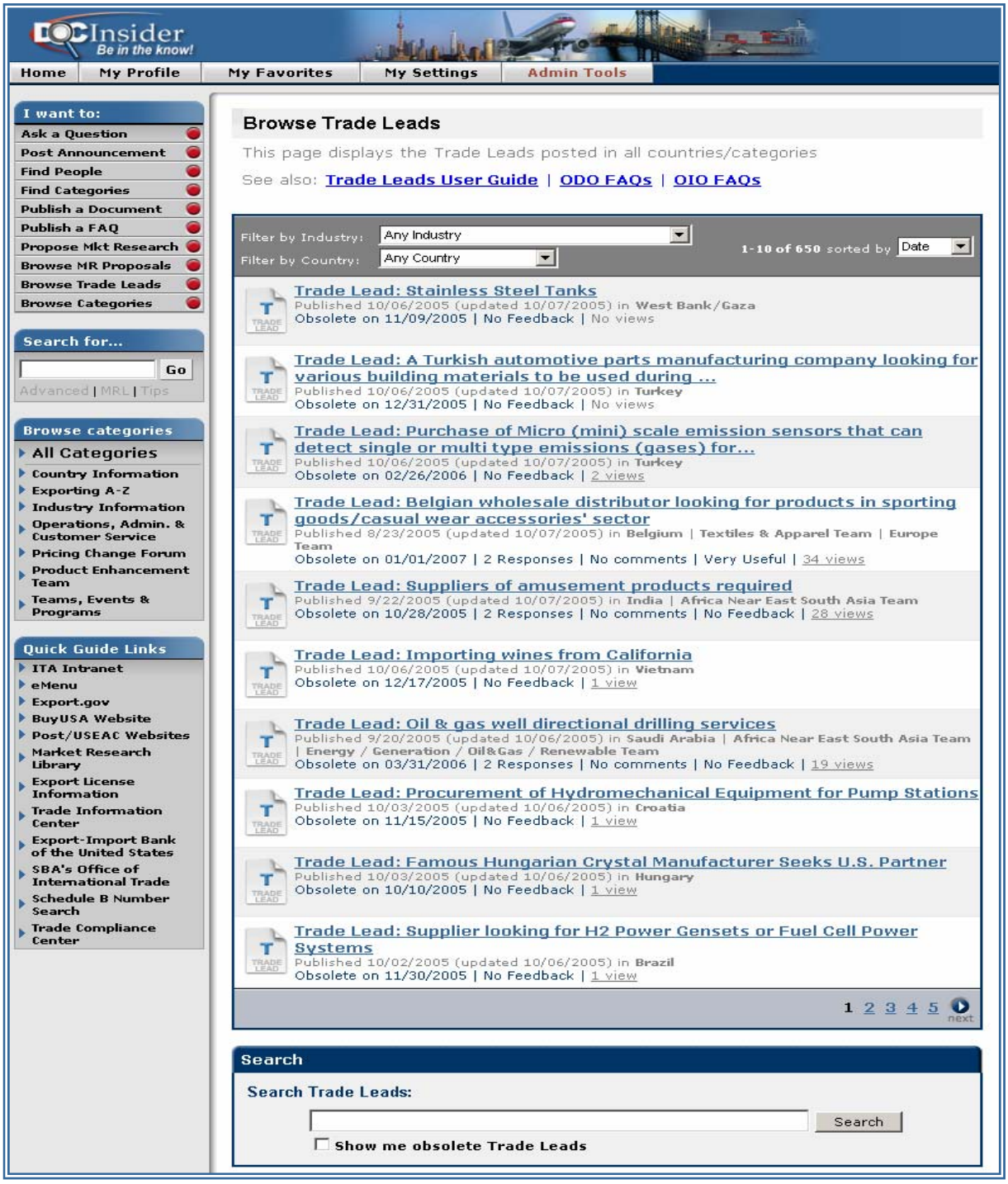
A key section of DOC Insider is the question and answer section. Staff can raise questions, which then enter DOC Insider. Other staff can post answers. Once again, the answers can be rated for usefulness.



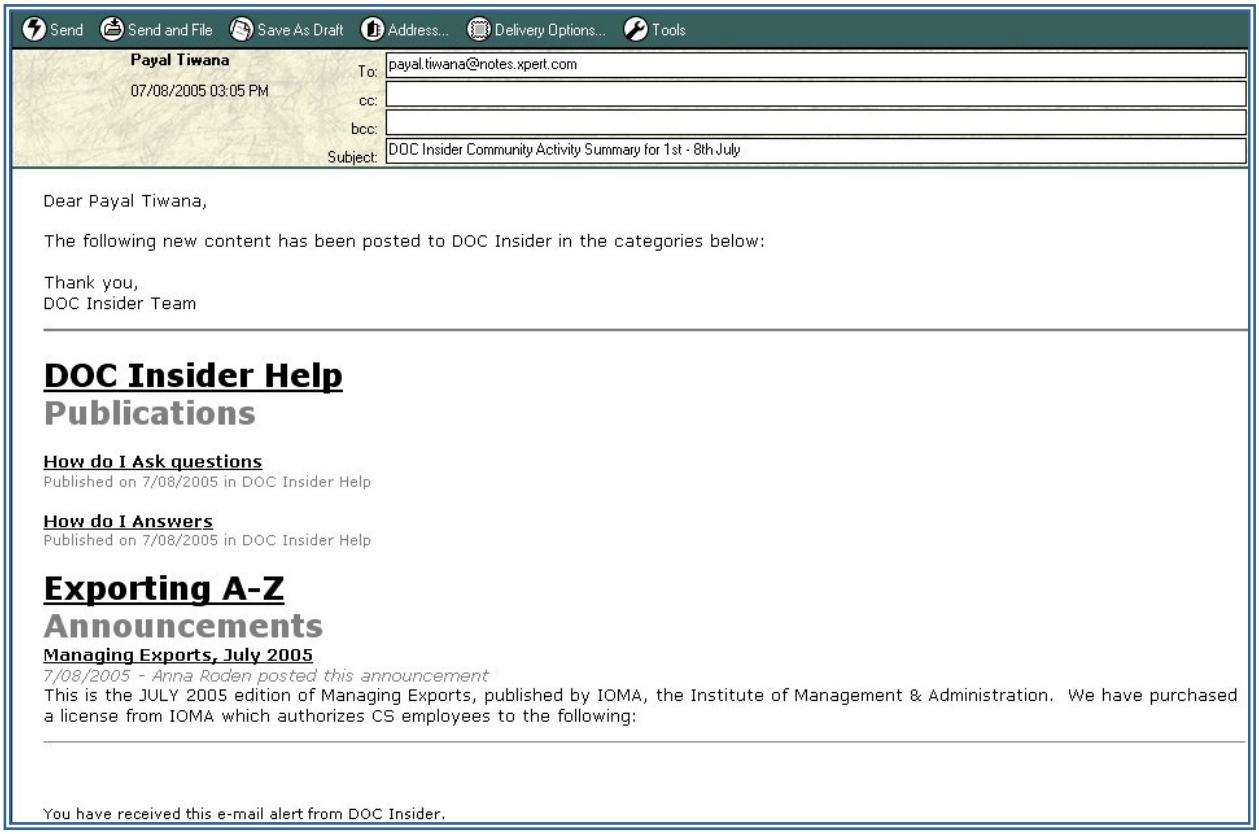
Answers are then saved in DOC Insider, and can be searched for in the future by staff.

Trade leads

Overseas staff work with companies who want to import US products. When they have met with an importer and that company has expressed a particular product interest, the details are recorded as a 'Trade Lead'. Previously, these leads were held on a different web site. Account managers in the US now have access to them on DOC Insider, and can search the database and forward details to potentially interested US companies.



Email alerts
Staff receive email alerts for new content on DOC Insider that is related to their areas of speciality.


Send | Send and File | Save As Draft | Address... | Delivery Options... | Tools

Payal Tiwana
07/08/2005 03:05 PM

To: payal.tiwana@notes.xpert.com
cc:
bcc:
Subject: DOC Insider Community Activity Summary for 1st - 8th July

Dear Payal Tiwana,

The following new content has been posted to DOC Insider in the categories below:

Thank you,
DOC Insider Team

DOC Insider Help
Publications

How do I Ask questions
Published on 7/08/2005 in DOC Insider Help

How do I Answers
Published on 7/08/2005 in DOC Insider Help

Exporting A-Z
Announcements
Managing Exports, July 2005
7/08/2005 - Anna Roden posted this announcement
This is the JULY 2005 edition of Managing Exports, published by IOMA, the Institute of Management & Administration. We have purchased a license from IOMA which authorizes CS employees to the following:

You have received this e-mail alert from DOC Insider.

REFLECTIONS

Need for top-level agreement and consistent approach

Because of cultural issues and some technical issues it seems that the DOC Insider was initially accepted faster in the onshore offices of the DOC. However senior management are committed to the need for such a tool, and usage is increasing across the organisation as people see its value.

Training and experience

When new tools are introduced, training is important and users will increasingly use the tool as they experience good results. With the DOC Insider a decision was made to use a ‘hearts and minds’ approach to the tool. Obviously as time advances, increasing amounts of useful knowledge is documented in the database, and therefore search results yield better information. In addition, staff become more familiar with the use of discussions and discussion forums over time, and can see real value in becoming involved as a participant.

Making connections

A skills or expertise locator that also archives FAQs and trade information is a significant asset that can solve knowledge problems left unanswered by traditional Document Management Systems. DOC Insider is a very user friendly tool, and does attempt to build emotional connections of relevance between staff members who may never get to meet face to face. Photos and biographies are used to help make these connections. In addition, users get to ask for information quite informally and field email style replies. This type of knowledge tool can produce a knowledge sharing environment quite distinct to a Document Management System (where staff willingly contribute) and can be ‘rewarded’ by receiving positive feedback from colleagues.

Case Study – Canada

BACKGROUND

Collaboration has many forms and meanings within the context of how TPOs work with companies, and how they collaborate internally across distance and across work teams. Foreign Affairs Canada (FAC) and International Trade Canada (ITC) work 'collaboratively', both internally and externally, in a number of different ways, using different techniques and technologies. They have a fully functioning Document Management System, but need other technologies to share documents with people outside the organisation. They are also looking to establish an environment for sharing ideas and discussions and capturing them in an online environment.

KEY FEATURES

Communities of practice
An area identified for priority work by Canada is the use of more collaborative work areas to share information and documents with parties outside the TPO, when they are engaged in policy work simultaneously. A pilot project has been managed by the library staff of FAC. Software for the collaborative environment was initially purchased to use for the G8 summit in Alberta in 2002. The software is Canadian, manufactured by Tomoye Corporation (www.tomoye.com). Tomoye is a leading manufacturer of community of practice software, and is supplying CoP management software to key users such as the US Army and the US Federal Services Administration Office of Technology Strategy (OTS).

After the G8 summit, the software was no longer required and the license was transferred to the FAC Library Services division. The library's pilot project has involved setting up a number of small groups to work with the software and establish its value. It was regarded as a natural extension of the work that the library team was undertaking, and the emphasis was more on the social aspects of communities of practice, than on driving a technological solution.

Specialist portfolio librarians
The specialist portfolio librarians work closely with client groups who are ordered either by sector of interest, or geographically. The initial projects have been largely geographical in nature, but in the future sector based groups may be developed. The portfolio librarians work with 'community' leaders to initially set up a space. The librarians do not manage the sites, as they need to be self-sustaining and viable in their own right, with ongoing engagement from community members to keep going after the initial start point. Communities of practice are of considerable current interest, but there has not been a cohesive organisation-wide policy on the appropriate software to use – some other divisions have been experimenting with their own CoP software and solutions. The organisation is aware that a consistent approach is required, and is working toward this end.

Pilot programmes
The initial pilot groups were set up around two geographical areas of interest – China and Mongolia, and Japan. The China/Mongolia CoP was part of the China Cluster Initiative that was established in November 2003. The department needed to reach out and engage in particular with China experts outside the organisation. The China Cluster initiative was established to connect:

- Departmental China experts – both in Canada and offshore
- Interdepartmental contacts – Immigration, Department of Health etc
- Business contacts – Chamber of Commerce, Asia Pacific Foundation etc
- Academics

Shared online space
The intention was for this group to meet by teleconference on a quarterly basis. There was a need for ongoing contact between members, and this could be provided by creating a shared online space for the group. The software enabled FAC to create a password protected Extranet that was built alongside the normal FAC network. Under the Tomoye software highly specific access permissions can be set up that give users access only to relevant parts of the site, and to documents that they are entitled to access. Users have either view, add or editor rights depending on their security settings. A leader and an editor are set up for each section of the site. The access is arranged by 'clusters' – these are the same sub-communities identified above. A member of the departmental cluster (ie an employee of FAC/ITC) will have access to all four clusters, but a member of the other clusters will only be able to access their own cluster group section.

Types of 'knowledge objects' that can be placed on the CoP include documents, presentations, links to websites and graphic images. Some of the documents that appear on the site, such as minutes of meetings, may be the same as the documents in the FAC/ITC Document Management System, but there is no direct link from the CoP to the Document Management System. Placing a knowledge object onto the site is quite straightforward – similar to attaching a file to an email. Once a knowledge object is on the site, a discussion can be started around it and all comments saved and searchable.

Fostering a culture of online collaboration
The culture change needed to foster good online collaboration has been interesting, as traditionally, the department did not always consult widely on policies. This has required a change of mindset on the behalf of departmental officers. Experience is showing that the CoP is a useful way to quickly harness a range of opinions and ideas from well-qualified experts. There was also some pressure from Central Government who realised that many government agencies need to be involved in policy debates, and therefore need a shared workspace.

Tools
The CoP environment is quite flexible. Persons invited to join a group can post details on their areas of interest and skills or expertise. Members of the group can search for documents, discussions or experts using a keyword search. They can then join a discussion, or engage directly with an expert.

Email updates
A very useful aspect is the Subscribe to Email page – by selecting this, the community member can receive updates via email, and then can click through to a page of interest from the email.

Training
Communities can be quite large. At the moment, the China Cluster has over 200 members, many not located at the Head Office. As a consequence, detailed online training material has had to be provided for the members. They are all given screen shots to work with, and they are given telephone training. Internally, the library team

meets with individual desk officers to educate them on the software and to show them how to post a document.

Considerable work has also been done to ensure that the site is very easy to use and practical – there was a feeling that the initial software deployed was too complex for users to easily engage with.

FAC/ITC would like to post more information onto the site from its commercial databases that are accessed through the Virtual Library, but there have been copyright issues that need to be considered. This is a major issue that all editors need to be made aware of during their training.

Commitment from staff
The key to an online community working is commitment from users, and ensuring that information is refreshed and current. Although ultimate responsibility rests with the editor, all users have to take responsibility for ensuring that the space is used. The message given to desk officers is that this is the new way of doing business, and they must understand the tool and use it to its maximum potential.

Other collaborative functions
FAC/ITC has also built collaborative functions into some of its other web services, for example the Virtual Trade Commissioner, which is a personalised web page for Canadian exporters, accessed from the main ITC page for Canadian exporters. Exporters are invited to register on the site, and to set up their own profile, which details markets of interest, and also products that they deal in.

Exporter Intelligence
The site is then intelligent enough to personalise the view of exporters, so that they see information that is relevant to their sectors and markets of interest. News stories and trade leads can also be directed to them. The site also gives information on services that are available to exporters via the overseas Canadian Trade Commissioner Service. It also enables the exporter to fill in an online request form and forward it directly to an offshore trade commissioner for action. The exporter is able to see the photograph and the bio of the officer that they are dealing with, and the service request goes directly to the individual, with a planned five-day turnover for responses.

E-discussion pages
Another area where there is some online interaction is in new policy areas. FAC has developed a series of e-discussion pages, where Canadians are able to post comments and suggestions around specific policy areas. The e-discussion pages are open for a period of time for gathering input, and then after subsequent analysis, FAC publishes a summary report on the results of the e-discussion. The main page for each discussion has details on the reasons for the policy debate, and can hold links to documents, video files, and links for further information. Individuals are able to register for the site, and then to post a comment. These comments are monitored, but as long as they meet overall policy relating to 'civil' rules, they will be posted. There is usually only one e-discussion active at any one time.

Quick reference guide to using the FAC/ITCan's Corporate Repository

Foreign Affairs Canada and International Trade Canada

Canada

What to send to FAC & ITCan's Corporate Repository

FAC/ITCan Information Management (IM) Quick Reference Guide

The digital age highlights the importance of good information management.
To manage FAC and ITCan's information efficiently, everyone needs to know what information to save and what not to save, differentiating between documents and e-mails of enduring value and those of transitory value.

Enduring Value

Information of enduring value reflects the business of FAC and ITCan. It includes information that initiates, authorizes or completes departmental action; it also includes information that documents a decision or an action.

Information of enduring value must be sent to the appropriate Corporate or Local IM Repository.

Corporate	Local
Information that may have value to more than one work/organizational unit.	Information whose value is limited to a specific work/organizational unit.

Examples: **Information of Enduring Value**

- E-mails or other documents that provide evidence of a departmental action or decision, or are a part of a decision-making process
- Diplomatic notes
- Budgets (programs, fiscal)
- Plans (project plans, training plans, business cases)
- Contracts (financial, legal)
- Draft documents where necessary to record the evolution of a final document

Transitory Value

Information of transitory value has value for a limited time or purpose. It includes personal and casual communications, meeting notices, communications on routine actions, and comments that are wholly incorporated into subsequent documents.

Information of transitory value may be deleted once its purpose is served.

Transitory Records Authority URL:

http://www.archives.ca/06/06040109_e.html

Examples: **Information of Transitory Value**

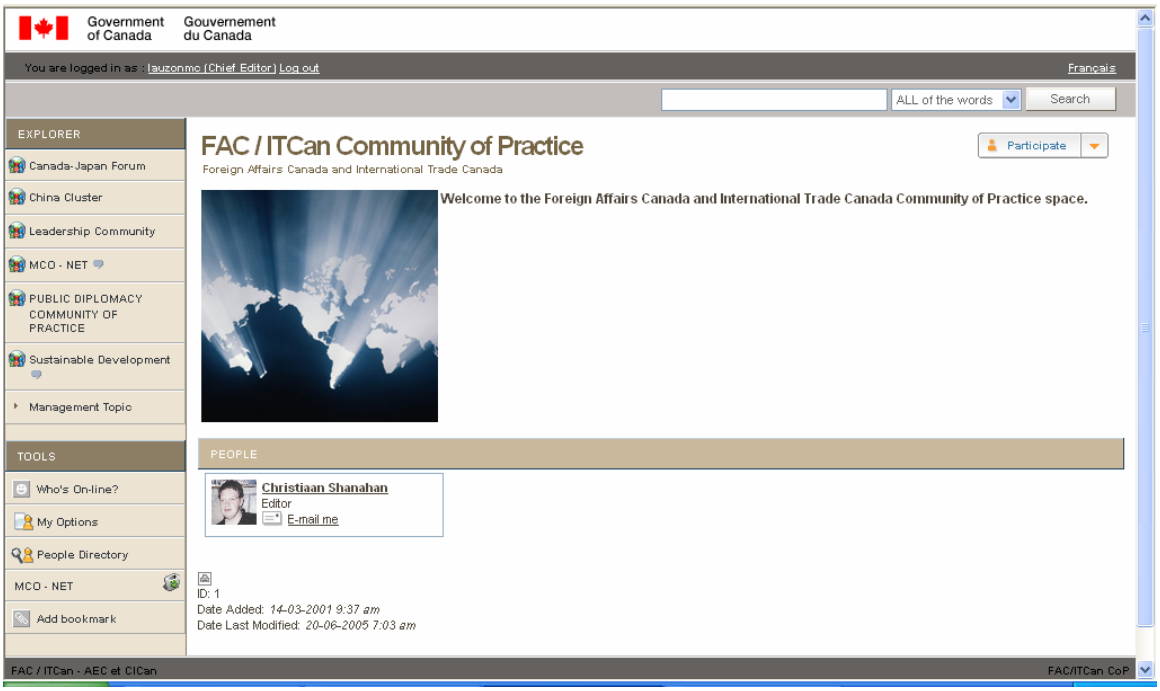
- E-mails or other documents received as copies
- E-mails or other documents where the action or decision referred to is recorded in a subsequent e-mail or document
- Most working documents
- Duplicate information (chronological files, circulation files)
- Drafts, even annotated, where information is found in a subsequent version
- SIGNET Broadcast Messages

Please note: Under the *Access to Information* and *Privacy Acts* (ATIP), "it is unlawful to delete any e-mail or document once an ATIP request relating to the subject is received."

Key Information Management Principles

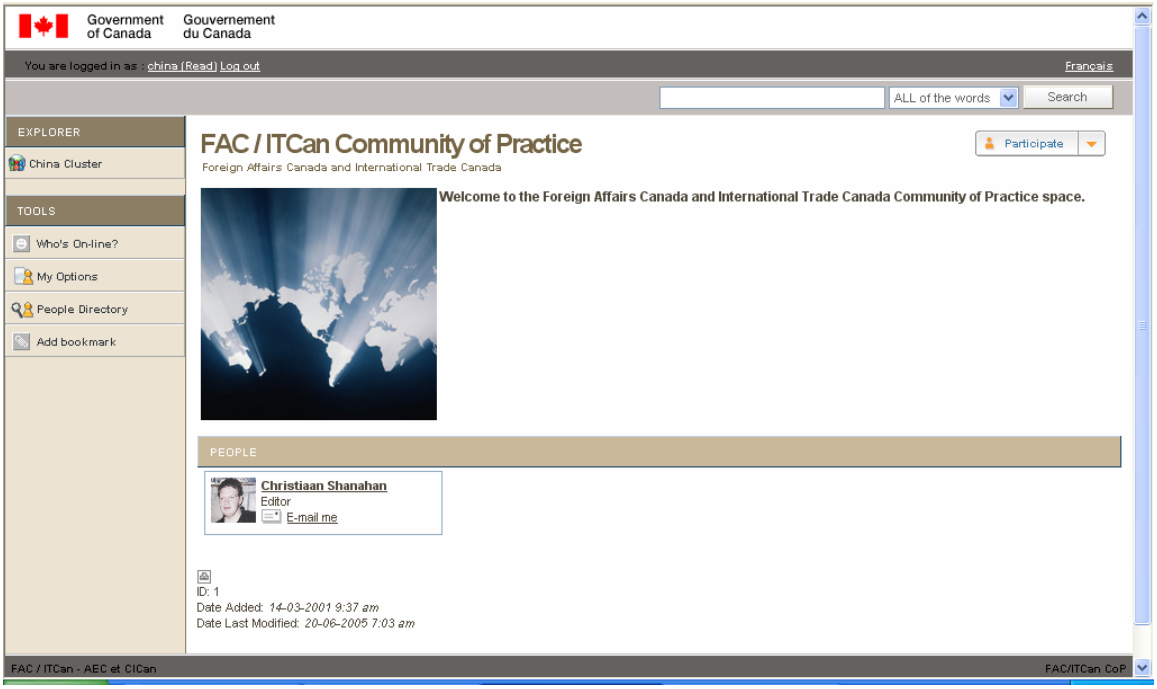
- All FAC and ITCan staff are custodians of information, responsible for the management of information under their control and custody
- FAC and ITCan favour the use of electronic systems as the preferred means of creating, using and managing information
- FAC and ITCan recognize the importance of the security classification of information, and the importance of relevant access controls for CBS, LES and staff of partner departments
- FAC and ITCan encourage the optimal sharing and re-use of information in accordance with security requirements

View of the FAC/ITCan Community of Practice home page for a chief editor
Logged in with chief editor access rights, this user can see the names and access of all of the communities of practice that have been created in the context of the pilot project.



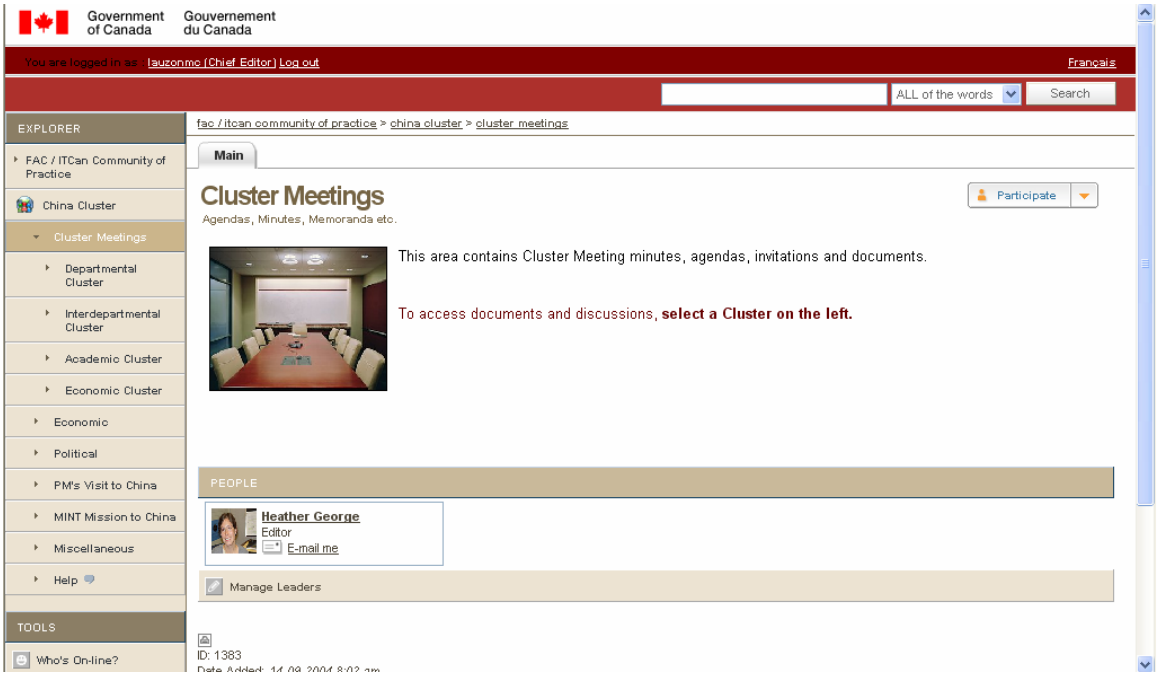
View of the FAC/ITCan Community of Practice home page for a member of the China Cluster COP

This user, a member of the China Cluster COP, only sees the name of this community on the menu on the left side of the screen when they log in to the FAC/ITCan Community of Practice space.

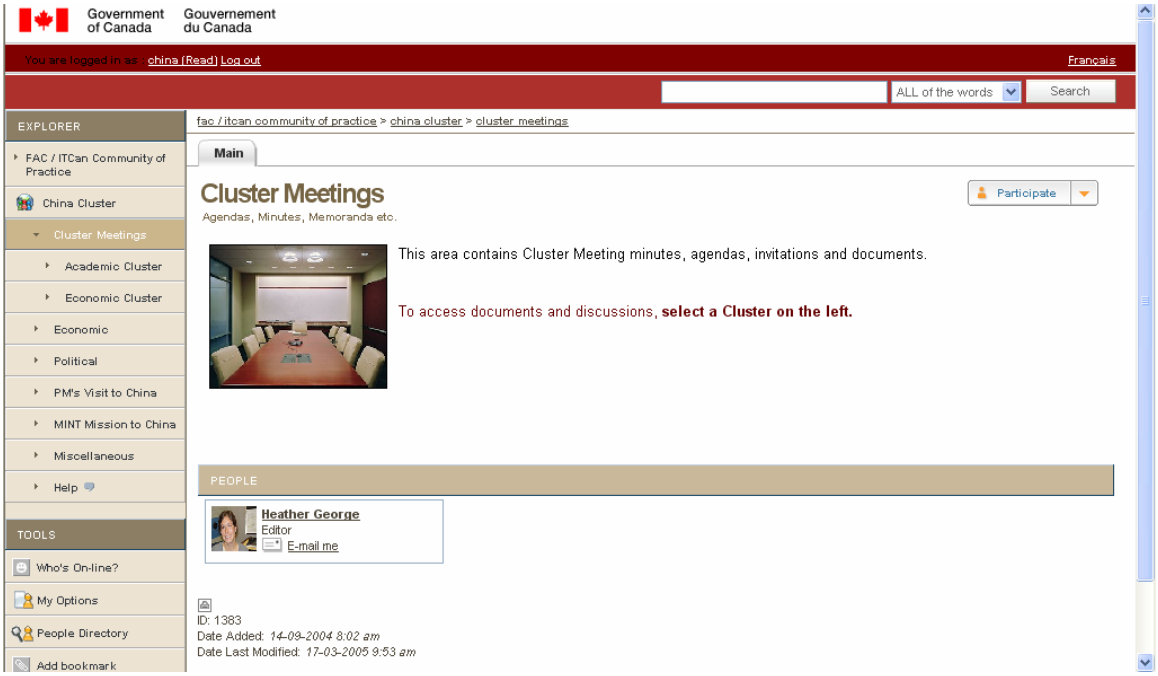


View of the meetings section of the China Cluster COP for a member of the departmental cluster

As a member of the departmental cluster, the user can access meeting documents from the departmental, interdepartmental, academic and economic clusters.



View of the meetings section of the China Cluster COP for a member of the academic cluster
As a member of the academic cluster, the user can access meeting documents from the academic and economic clusters.



REFLECTIONS

Importance of online collaboration across multiple locations
Online collaboration tools are important to organisations like TPOs where projects typically involve multiple offices, are split across a number of functional teams and include external parties (academics, industry groups, exporters, other agencies etc). Such projects need a common platform that enables staff to share information, store and archive information over time, and seek feedback and comments. There may also be occasions where there is a need to simultaneously access information in a chat-room style environment, but this is considered secondary to the main role of sharing and storing information.

Need for simple tools and adequate training
As online collaboration is a new way of working and sharing information, progress needs simple tools, adequate training and knowledge champions. The Canadian pilot on CoPs is an interesting development and meets these diverse needs. It seems particularly sensible to have the skilled library research staff ‘managing’ the communities of practice initially and ensuring that internal staff are skilled in using the tool, and are motivated to use it.

Other Knowledge Management Initiatives

OVERVIEW

Respondents were asked to indicate if they have implemented, are planning to implement or are not planning to implement a selection of other Knowledge Management initiatives.

Central repository of research undertaken

Answer	Number	% of Total
Have implemented	7	38.9%
Are planning to implement	4	22.2%
Are not planning to implement	7	38.9%

Central repository of presentations or documents

Answer	Number	% of Total
Have implemented	9	50.0%
Are planning to implement	6	33.3%
Are not planning to implement	3	16.7%

Central repository of best practices, guidelines and manuals

Answer	Number	% of Total
Have implemented	8	44.4%
Are planning to implement	6	33.3%
Are not planning to implement	4	22.2%

Knowledge map of staff skills and expertise

Answer	Number	% of Total
Have implemented	6	33.3%
Are planning to implement	3	16.7%
Are not planning to implement	9	50.0%

Knowledge management training and awareness

Answer	Number	% of Total
Have implemented	7	38.9%
Are planning to implement	6	33.3%
Are not planning to implement	5	27.8%

Communities of Practice

Answer	Number	% of Total

Have implemented	8	44.4%
Are planning to implement	4	22.2%
Are not planning to implement	6	33.3%

Project debrief system to capture lessons learnt

Answer	Number	% of Total
Have implemented	1	5.6%
Are planning to implement	8	44.4%
Are not planning to implement	9	50.0%

Social Network Analysis

Answer	Number	% of Total
Have implemented	1	5.6%
Are planning to implement	4	22.2%
Are not planning to implement	13	72.2%

Conclusions

Most APEC economy TPOs studied had a variety of Knowledge Management technologies deployed in their organisations. A typical set-up included:

- Document Management System (DMS)
- Corporate Intranet
- Client Management Software (CMS)

In some cases these systems were stand alone, and in others they were integrated – typically under an Intranet/Internet solution. There is a general move towards integration, where possible, in order to minimise the number of knowledge repositories. This ensures that there is less duplication of information and that information is up to date. This also makes systems easier for employees to use.

Document Management System
The DMS is typically the backbone of the Knowledge Management system. It is where all documents of importance are held and can be retrieved by all staff. As email becomes more significant, DMS applications are being integrated with Outlook (or other email systems) to enable users to file emails directly into the DMS.

TPOs are aware that it is simply impossible for users to place all documents and emails into the DMS. Automated systems are therefore being introduced to make it easier for users. Users also have difficulty assigning correct file numbers to documents, resulting in a high error rate in numbering documents, which can have serious implications for future archiving. Again TPOs are looking to automate this function through the capture of metadata on documents.

In both DMS case studies, DMS selection had been either mandated by central government (Canada) or had been an automatic choice as most other government agencies were using one system (New Zealand). The benefit of a standard system across government is obvious: Knowledge Management and Information Technology managers would be able to exchange ideas with other government agencies and meet in user groups to discuss and share common problems.

Project implementation
Knowledge Management technology projects can be complex and typically take 18 months to 2 years to implement. Considerable emphasis therefore needs to be placed on defining user needs at the start of a project. Duplication of data was a factor in a number of cases, which slowed the implementation of projects. Some Knowledge Management projects, especially in the area of Records Management and public information, are complex, expensive and have little relation to TPO business objectives. They may be imposed by a central government directive.

Library
Library functions are still important, and a library team is an integral part of a Knowledge Management strategy. Increasingly library information and databases are online and are becoming available to all staff, irrespective of location. This has obvious benefits for staff working in remote locations. However concern was expressed about potential breach of copyright by staff passing on information to outside parties. This is an area where greater access to information needs to be supported by guidelines and training on acceptable use and copyright.

Internet portals
TPOs are increasingly trying to make information automatically available to SMEs via online portals and Internet access. This is a significant step forward in knowledge transfer and should be promoted where possible. The Japanese and Korean CMS systems and the Canadian Virtual Trade Commissioner are examples of sites that are interactive and can be tailored to meet exporter needs.

Collaboration
Collaboration technology is the next step forward, and gives virtually immediate access to information, feedback or discussion. TPOs are experimenting both with internal collaboration tools to enable better internal sharing of ideas and information, and with external collaboration tools. These enable TPOs to maximise the impact of information by reaching a wide group of companies simultaneously and creating an environment rich in information for knowledge transfer. Case studies indicate that collaboration projects need to be carefully considered, and that success will depend on having a core group of enthusiastic users.

KNOWLEDGE MANAGEMENT BEHAVIOURS

Overview

Knowledge Management initiatives and technology solutions often need to be supported by changes in behaviour to ensure that knowledge is shared and documents are placed into shared repositories. The knowledge sharing culture within an organisation is an important component of successful Knowledge Management.

94.4% of respondents thought that knowledge sharing behaviours should be rewarded. However, only 22.2% actually provided rewards to staff.

Do you think knowledge sharing behaviours should be rewarded?

Answer	Number	% of Total
Yes	17	94.4%
No	1	5.6%

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?

Answer	Number	% of Total
Yes	4	22.2%
No	14	77.8%

50% of respondents stated that knowledge sharing was part of individual performance management assessments.

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?

Answer	Number	% of Total
Yes	9	50.0%
No	9	50.0%

Examples of the types of rewards used include:

Financial rewards (small).||Public recognition in a monthly newsletter. (US)

Prize money: Once every 6 months, qualified knowledge providers are rewarded by money||- Incentive: Additional points to personal record were provided to someone who registers ||knowledge actively.||- Knowledge festival: Opened once a year, and active p (Korea)

Coupon, free tickets, etc. (Taiwan)

Gratuity. (Russia)

61.1% of respondents do not have a formal induction programme within their organisation. Only 27.8% or five respondents have a formal mentoring programme.

Does your organisation have a formal induction programme?

Answer	Number	% of Total
Yes	7	38.9%
No	11	61.1%

Does your organisation have a formal mentoring or coaching programme?

Answer	Number	% of Total
Yes	5	27.8%
No	13	72.2%

Half (50%) of respondents state that the annual turnover of staff is considered to be low and only 16.7% conduct exit interviews with staff as they leave the organisation.

Is the annual turnover of staff in your organisation considered to be low, medium or high?

Answer	Number	% of Total
Low	9	50.0%
Medium	8	44.4%
High	1	5.6%

Does your organisation conduct exit interviews with staff that leave your organisation?

Answer	Number	% of Total
Yes	3	16.7%
No	9	50.0%
Sometimes	6	33.3%

Case Study – Korea

BACKGROUND

KOTRA has wholeheartedly embraced the delicate balance between developing a knowledge sharing culture and implementing knowledge sharing technologies. Knowledge sharing behaviours are fully integrated into performance management and reward systems and are fully transparent across the business.

KEY FEATURES

KOTRA has recently changed its evaluation and reward system by working with a consulting firm and benchmarking against other companies. Its aim is to boost the quality of knowledge-based activities by increasing rewards for high knowledge providers within the organisation.

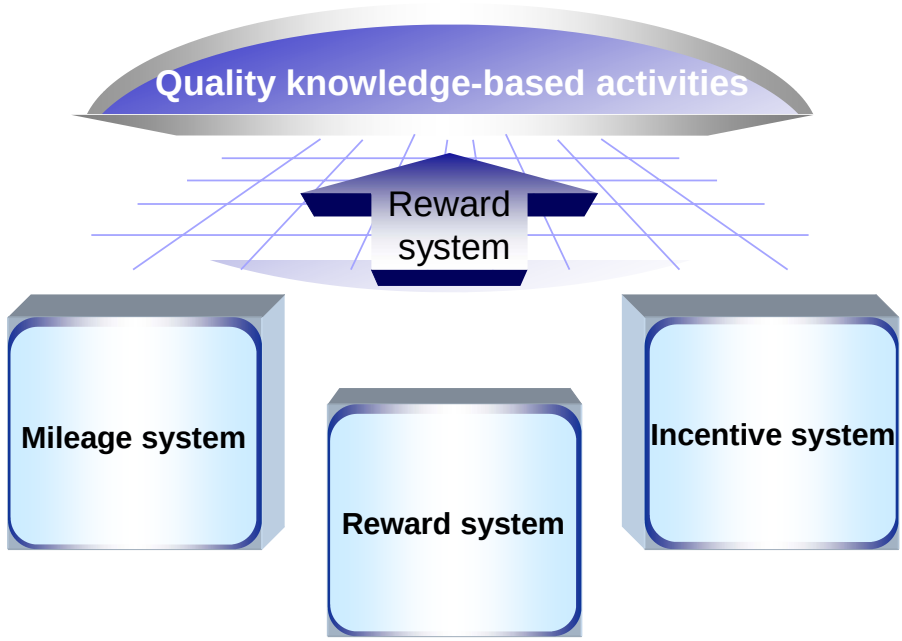
How KOTRA rewards staff who share knowledge
KOTRA's knowledge based reward system comprises three pillars:

- Mileage system – Employees receive mileage from knowledge activities according to colleagues' evaluation. Mileage results have an influence on personal performance scores

- Reward system – Employees are given cash incentives for active participation in the Knowledge Management System

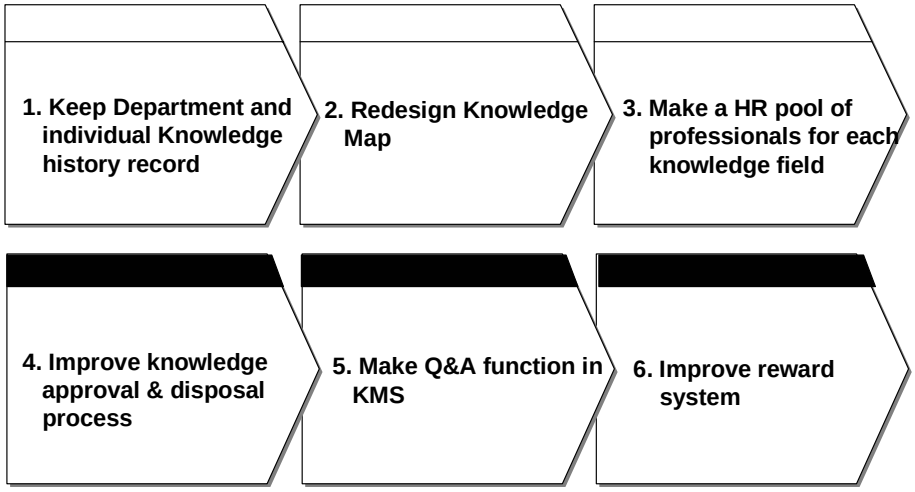
- Incentive system – MBO scores are provided for 5% of employees who obtain high knowledge mileage

    - Knowledge reward system – Rewards are given every three months (Knowledge Leader, Excellent Knowledge Provider, Excellent Knowledge Utilizer, Excellent Knowledge Manager)
    - Yearly reward – Knowledge Champion



Tasks for the future
KOTRA is focusing on several initiatives in the near future:

- Keep detailed department and individual knowledge history records
- Redesign Knowledge Map to fit the rapidly changing business environment
- Make an HR pool of professionals for each knowledge field who play the role of knowledge managers and approve and dispose of knowledge according to agreed processes
- Improve knowledge approval and disposal process, shortening the preservation period so that out of date knowledge is removed immediately to keep knowledge up to date
- Make a Q&A function in Knowledge Management System to keep internal discussion more active and useful to actual work
- Improve reward system so that employees and even customers may share their own valuable knowledge



REFLECTIONS

KOTRA's focus on integrating its Knowledge Management strategy with core functions within the organisation is reflected in its performance and reward measurement systems.

Rewarding high knowledge providers and contributors is key to the success of its Knowledge Management strategy. KOTRA has not one, but three mechanisms for achieving this – the Mileage, Reward and Incentive systems.

The reward system is integrated into daily processes and supported by robust technologies. KOTRA seems to have the balance right between culture, content and technology.

Case Study – Mexico

BACKGROUND

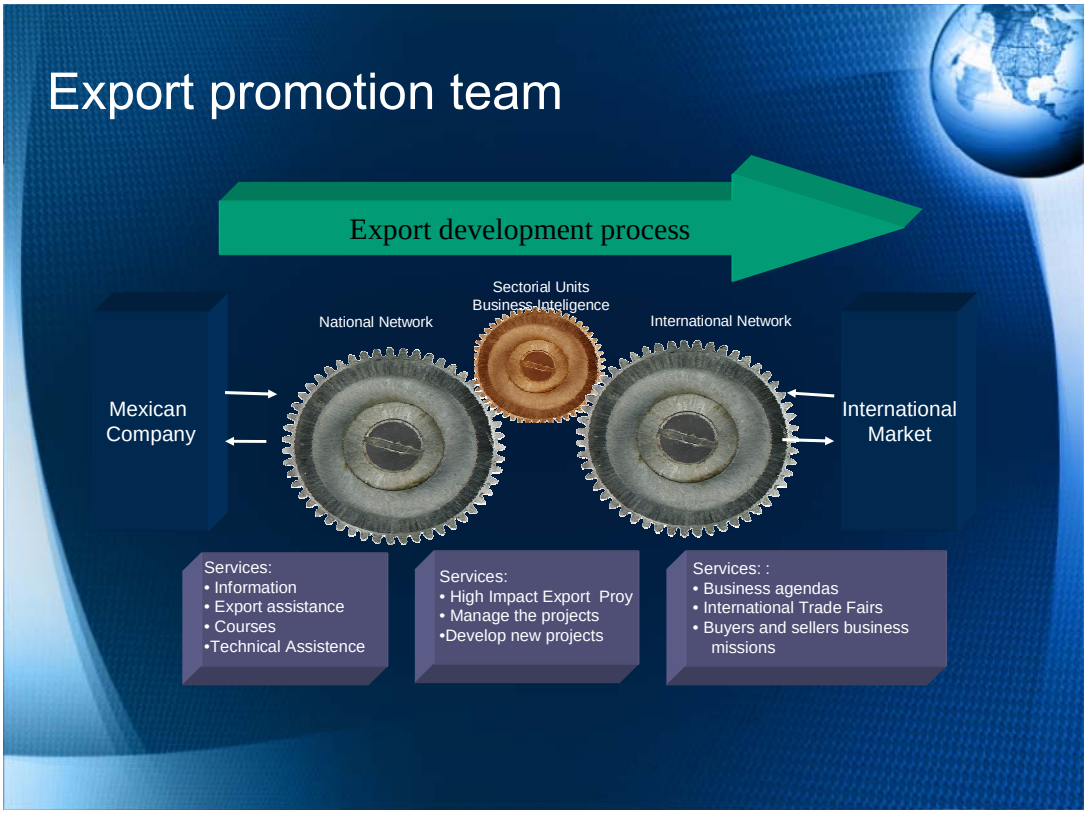
Bancomext is a subsidiary of the Mexican Government, basically a trade finance organisation, which also has trade promotion functions. Bancomext has a range of 31 offices overseas, 25 regional offices in Mexico, and a Head Office in Mexico with centralised functions over policy, promotions, and so on.

The primary aims of Bancomext are to:

- Accelerate the growth of Mexican companies, especially PYMS (SMEs)
- Increase its participation in international markets
- Offer integrated solutions that strengthen competitiveness and promote investment at a company level
- Achieve these results through access to Bancomext financial and promotional services

To do so Bancomext decided to link its offices more closely into client activities – to in effect create a 'chain of value' for its clients. The 'chain of value' also represents the different roles of the various Bancomext participants in the internationalisation process for client companies:

- The Mexican regional offices meet with clients, diagnose issues and are the window into the client and their needs
- Head Office provides a set of clear policies and processes, and also through IT systems provides intelligence on markets and services (see the separate section on the Bancomext Trade Portal)
- The overseas offices provide the link to markets and the identification of partners and opportunities



KEY FEATURES

With the Mexican economy opening to global competition through a series of FTAs such as NAFTA and the Mexico/EU FTA, there was a need for Mexico to become more competitive. The Mexican Government accepted that it has a role to play in ensuring that Mexican government services are also internationally competitive and that it must provide a top quality service.

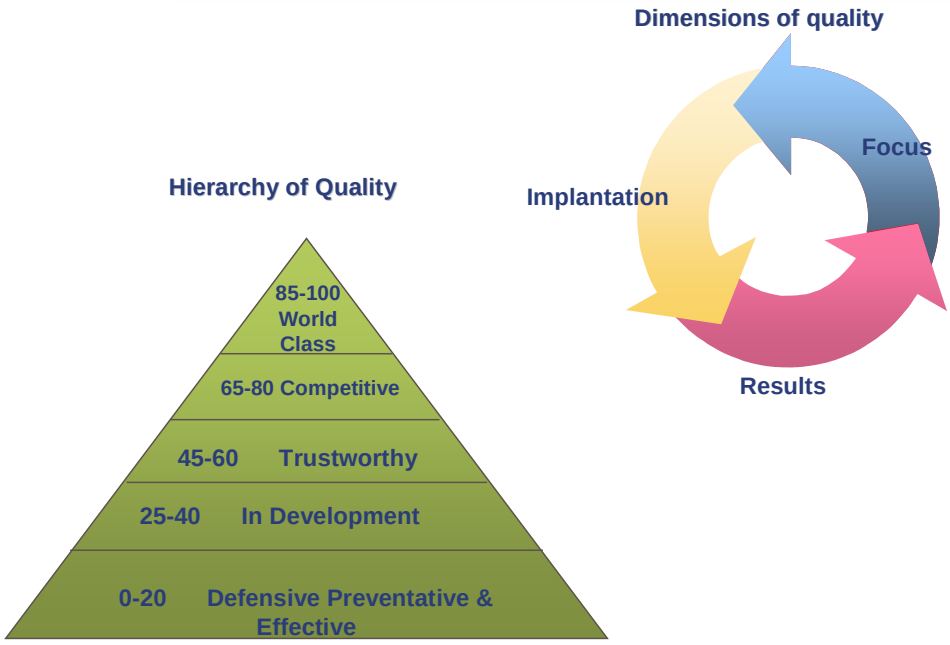
Improving quality of service – PROMAP
The programme for improving quality of delivery of services by government agencies was called PROMAP – Programme for Modernisation of the Public Administration.

Elements in the plan included:

- Improvements in priority processes
- Training and professional development
- Strategic planning
- System of measurement via indicators
- Definition of standards

Measuring quality improvements – INTRAGOB
A model to measure quality improvements was introduced, called INTRAGOB. INTRAGOB is based on the premise of government agencies continually improving performance through innovation, leading to client and citizen satisfaction, and an impact on society. Agencies are ranked on a 0-100 scale that illustrates the process and stage of quality implementation.

JERARQUÍA Y DIMENSIONES DEL MODELO



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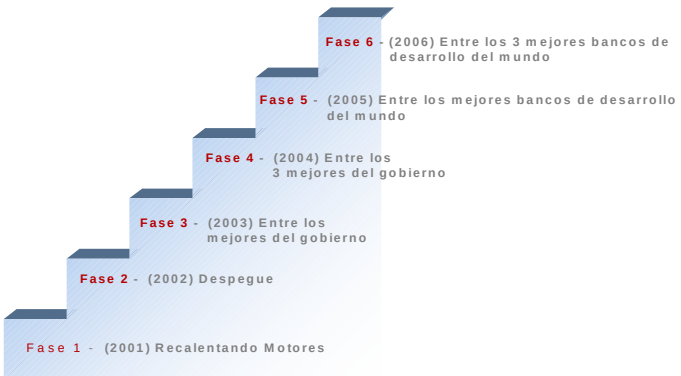
Bancomext determined on a six-phase plan to reach world-class standard by 2006 – joining the top three development banks globally. Adoption of Quality Measurement on the INTRAGOB model would permit Bancomext to become a more competitive organisation, and add increased value to clients, employees and the economy.

LA CALIDAD EN BANCOMEXT

Bancomext, atendiendo a estas iniciativas y considerando su misión ante las empresas mexicanas exportadoras, a adoptado un Modelo de Administración por Calidad, tomando como base tanto el **Modelo Nacional para la Calidad Total**, como el **Modelo de Calidad INTRAGOB**, orientado a la productividad y competitividad que le permitan convertirse en una empresa competitiva, con enfoque hacia la creación de valor superior a sus clientes, empleados, Institución y sociedad.



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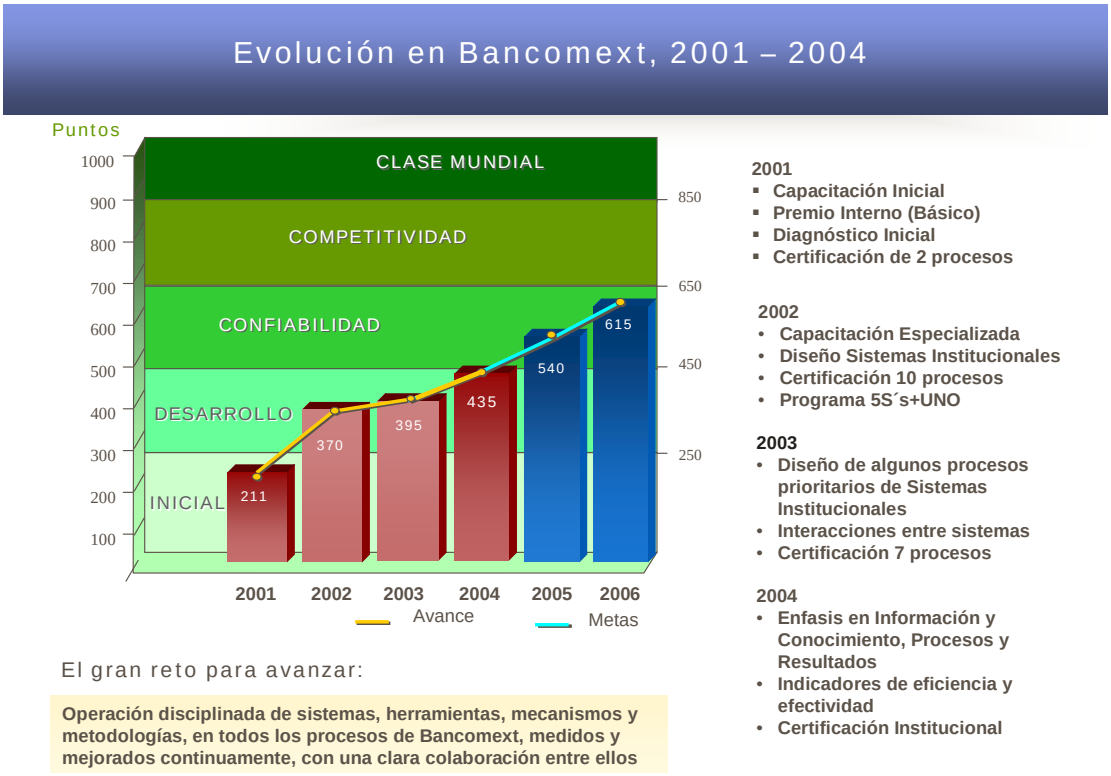
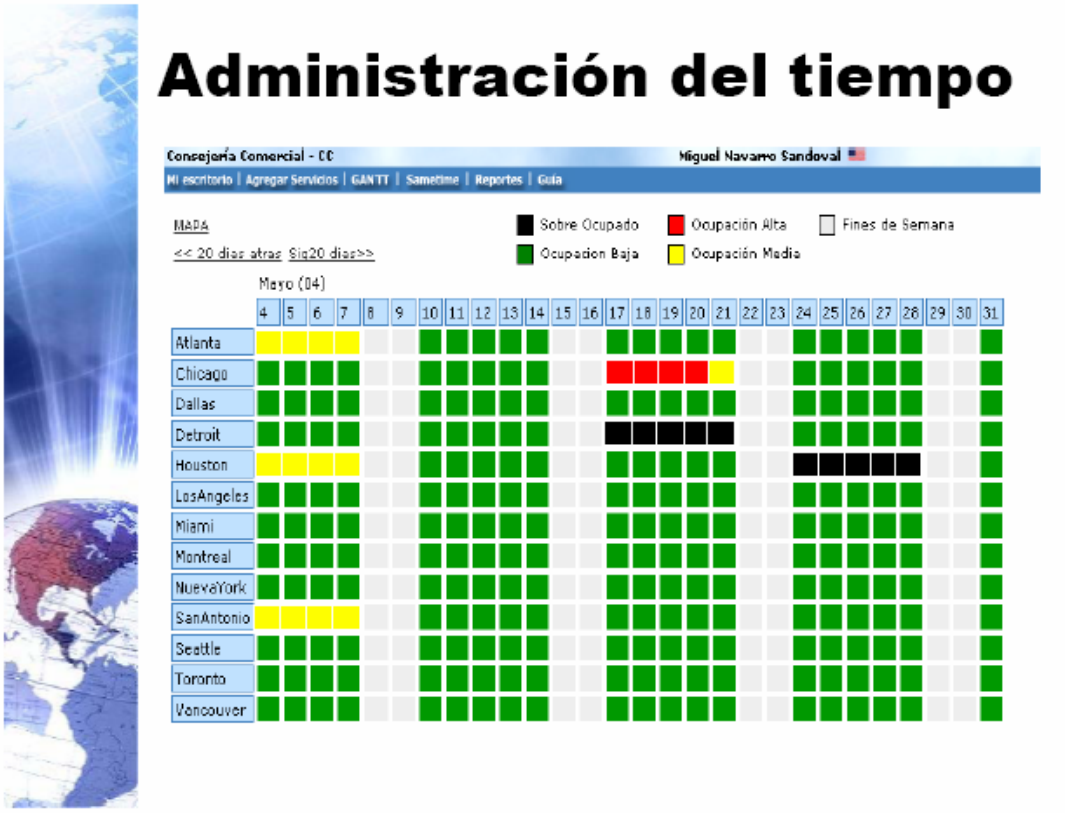
Progress has been impressive. Bancomext has met all targets, and is now in the fifth phase of the programme.



Customer relationship and performance management - SIPI
SIPI (Integrated System for International Promotion) is the central Knowledge Management tool that puts in place processes and measurements to enable BANCOMEXT to meet its INTRAGOB targets relating to the export development process.

SIPI has been developed as a Customer Relationship Management system in-house, but is also a powerful performance management tool.

Within SIPI work is measured from contract to delivery. Work is assigned from the Mexican offices to the offshore network. At a glance it is possible to see if an offshore office is becoming overloaded, and whether it is in fact able to take on any more work. Colour coded keys are used to show graphically where any choke points exist in the system.



Once a piece of work is completed and returned to a Mexican company, a detailed evaluation form is completed. The quality of service provided by the Mexican office, the quality of work completed, and the timeliness of work completed by the offshore office are measured. The work is tagged to a particular officer onshore and a particular officer offshore.

Encuesta de evaluación de servicio/producto

Cliente: J PLUS COSMETICA, S.A. DE C.V.

Producto: Servicio Especializado en el Extranjero

Ejecutivo(s) que le atendieron:

En México: Ma. De La Luz Nunez Roman

En Miami: Elvia P. Mirabal Hinojosa

Seleccionar en cada pregunta la respuesta que usted considere.

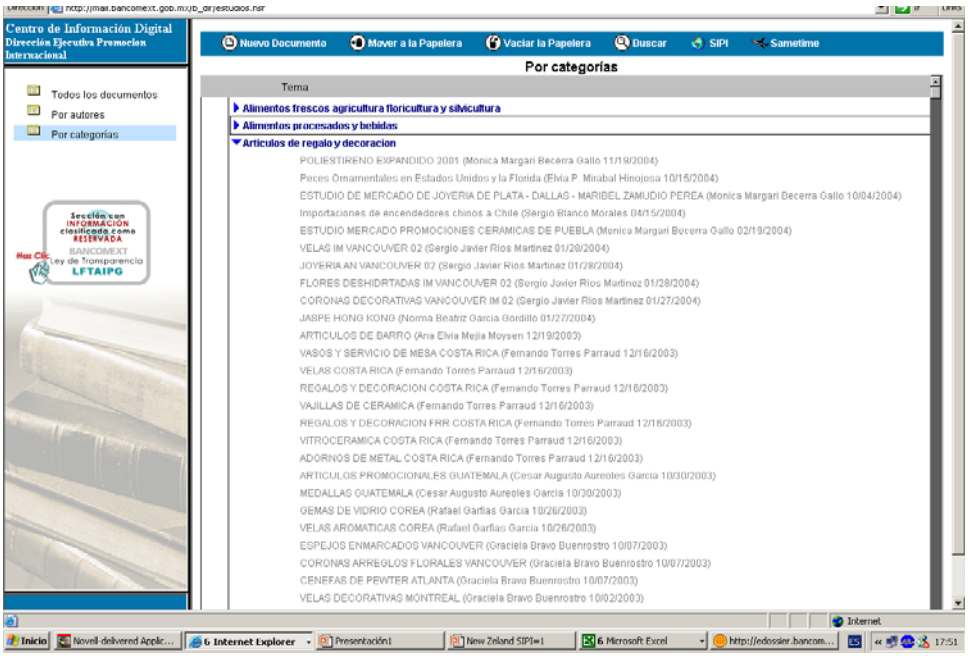
A. EVALUACIÓN GENERAL SOBRE LOS EJECUTIVOS	
I. Servicios Recibidos en México	
1. ¿La Calidad de atención del ejecutivo fue?:	No Aplica
2. ¿Cómo calificaría el conocimiento del negocio y asesoría para determinar el producto o servicio más adecuado para su empresa?	No Aplica
3. ¿El tiempo de respuesta a sus comunicaciones y solicitudes fue?	No Aplica
II. Servicios Recibidos en la Consejería o Módulo Comercial en el extranjero	
4. ¿La calidad de atención en la Consejería o Módulo fue?:	No Aplica
5. ¿ Cómo calificaría el conocimiento del ejecutivo respecto al país y nicho de mercado en el que usted está interesado?	No Aplica
6. ¿El tiempo de respuesta a sus comunicaciones y solicitudes fue?	No Aplica
B. EVALUACIÓN SOBRE EL PRODUCTO	
7. ¿El cumplimiento en los tiempos comprometidos por Bancomext para la entrega del producto fue:?	Excelente
8. ¿ Cómo califica el contenido del producto recibido?	Excelente
9. ¿Tiene probabilidades de cerrar operaciones de exportación durante los próximos seis meses, derivado del producto adquirido?	Si
10. Si la respuesta anterior fue Si, ¿Cuál sería el monto de exportaciones en dólares americanos que Usted estima?	

These evaluation forms are used to produce detailed reports on performance at an individual and office level. This is called the balanced scorecard. These reports are published and freely available for staff to see how they are ranked within the organisation. Factors such as impact and cost are also measured to arrive at a balanced scorecard.

Region	Consejería	Impacto	Clientes	Rentabilidad Real	Tiempo de facturación	Desempeño	Calificación numérica	Calificación Final 2005	Ranking	Calificación Final 2004	Calificación Final 2003	Calificación Final 2002
Promedio		**B**	**B**	**B**	**B**	**B**	**8.0**	**B**	**-**	B	B	B
	Promedio Asia	**B**	**B**	**B**	**B**	**B**	**8.0**	**B**	**-**	B	B	B
	Oficina 1	A	C	C	B	B-	7.4	B-	29	-	-	-
	Oficina 2	C	C	C	C	C	6.0	C	9	B	C	B
Asia	Oficina 3	B-	B	C	A	B	7.8	B-	29	C	B	B
	Oficina 4	C	C	C	C	C	6.0	C	28	-	-	-
	Oficina 5	C	C	C	B-	C	6.2	C	12	B	B	C
	Oficina 6	B-	B	C	C	A	7.4	B-	24	B	B	B
	Oficina 7	B-	C	C	C	B	6.6	C	23	B	B	B
	Promedio Europa	**A**	**C**	**C**	**C**	**C**	**6.8**	**C**		B	B	B
	Oficina 1	B	B-	C	B-	B	7.2	B-	9	B	B	C
	Oficina 2	A	B-	C	B	B	7.8	B-	19	B	B	B
Europa	Oficina 3	C	B	C	B-	B	7.0	B-	19	B	C	C
	Oficina 4	C	B-	C	C	A	7.0	B-	14	C	C	C
	Oficina 5	C	B-	A	C	B-	7.2	B-	2	B	C	B
	Oficina 6	A	A	B-	B+	B	8.8	B	7	B	B	B
	Promedio Latinoamérica	**A**	**C**	**C**	**A**	**B**	**8.0**	**B**		B	B	B
	Oficina 1	B-	B+	B-	B-	B-	7.4	B-	14	C	B	C
	Oficina 2	B	B-	C	B	B-	7.2	B-	1	A	B	B
Latinoamérica	Oficina 3	A	A	A	B	A	9.6	B+	27	B	B	B
	Oficina 4	C	B	C	C	C	6.4	C	29	C	B	A
	Oficina 5	C	C	C	C	C	6.0	C	6	B	B	B
	Oficina 6	C	A	B	B	B+	8.2	B	14	A	A	B
	Oficina 7	C	A	C	B-	B-	7.2	B-	14	B	C	B
	Promedio Norteamérica	**B-**	**B+**	**C**	**B**	**C**	**7.2**	**B-**		B	B	B
	Oficina 1	B-	B	A	B	B	8.2	B	11	A	A	B
	Oficina 2	B	B	B-	B-	B	7.6	B-	12	B	A	A
	Oficina 3	B+	B	C	B-	B-	7.4	B-	4	B	B	B
	Oficina 4	C	B+	A	B	A	8.6	B	3	A	A	B
Norteamérica	Oficina 5	A	A	B	B	B	8.8	B	19	B	B	B
	Oficina 6	B-	B-	B-	B	C	7.0	B-	19	B	B	B
	Oficina 7	C	B-	C	C	A	7.0	B-	24	C	B	B
	Oficina 8	C	B	C	C	B-	6.6	C	24	B	B	B
	Oficina 9	B-	B	C	C	C	6.6	C	7	A	A	B
	Oficina 10	A	B	C	B-	B+	8.0	B	14	B	B	C
	Oficina 11	C	C	A	B	C	7.2	B-	4	B	A	B

Document management tool - SIPI

Reports completed for companies are logged into SIPI. SIPI then in effect becomes a searchable repository of reports, working much like a Document Management System. The system is available to all staff via the Internet.



SIPI used in projects and client activity

Bancomext has sectoral strategies as well as strategies related to assisting individual companies. Each offshore office has on average 14 sectoral projects underway each year. Processes are in place to target sectors of importance to Mexico, to select appropriate key markets for development, and to then establish projects in each market which have the involvement of capable companies. In 2005 there are approximately 440 projects in total. SIPI is used to measure performance in projects as well as in single client activities.

REFLECTIONS

TPOs have unique needs

TPOs have process issues that often need bespoke software development to meet these unique needs. SIPI was developed as an in-house tool to meet specific objectives of Bancomext. The result is a tool that is sharply focused to meet the organisation's needs, but which may not be useful for other organisations. However the idea of linking a performance measure (such as timeliness or quality) directly to individual performance measurement by an online feedback form is very powerful.

Measuring performance

The balanced scorecard is a very visual way to demonstrate performance across offices. The scorecard is an objective tool that clearly shows how units are operating in terms of the key performance indicators established by Bancomext. Other agencies could use a similar approach whilst electing to use a different set off key performance indicators.

Conclusions

Rewarding Knowledge Management behaviours
There was general agreement from questionnaire participants that appropriate Knowledge Management behaviours should be rewarded. However, only 22% of participants had systems in place to appropriately reward Knowledge Management behaviours.

This could be a reflection of the difficulty in finding appropriate ways to reward relevant Knowledge Management behaviours. Common rewards include simple public recognition in newsletters (USA) or coupons (Taiwan and Russia).

Formal systems
KOTRA has a very well thought out system of rewards linked to its Knowledge Management technologies. The rewards are process driven, easily measured, easily verified and are objective. Systems such as these can feed directly into performance reviews and be a powerful catalyst to changing behaviours.

Informal systems
The SIPI database used by Bancomext is another useful tool. Although it does not directly reward Knowledge Management behaviours, it does require feedback on colleagues' performance to be completed and input. This then provides a basis for the Bancomext 'balanced scorecard'.

Other organisations prefer to take a softer approach to Knowledge Management and to encourage use by constant encouragement and rewarding success where appropriate, without a formalised system.

Knowledge Management managers should work closely with their Human Resources team to assess what they regard as appropriate Knowledge Management behaviours and how these can best be measured given technologies existing in the TPO, in order to then establish clear performance indicators for behaviours that can be built into individual personal assessments.

Induction of new staff
A minority of TPOs have systems in place for mentoring new staff, and formal induction programmes for new staff. Corporate Intranets seem to have taken over a greater role in internal staff education. If staff are in fact expected to learn about internal policies and guidelines from the corporate Intranet, special attention will need to be given to the user-friendliness of the Intranet, ensuring that chapters and sub-chapters are logically laid out, and that the Intranet is easily searchable.

Knowledge mapping
Creating an organisational 'knowledge map' of the TPO was not covered in the questionnaire. However knowledge mapping could be a useful strategy for a globally dispersed TPO and could help to understand what information is considered really useful by employees in different locations, and how and from whom this information is sourced.

FINAL CONCLUSIONS

Knowledge Management technologies and strategies are well understood by APEC member economy TPOs. The majority of APEC TPOs have Knowledge Management strategies in place, and a team responsible for implementing these strategies. These teams are in some cases called Knowledge Management teams, and in other cases fall within the Information Technology team structure.

Strategies to meet business objectives
Knowledge Management strategies have been designed to improve organisational efficiencies and to assist in implementing overall business objectives. Because each member TPO is operating slightly differently, according to government objectives and the make-up of its economy, Knowledge Management strategies and technologies aimed at meeting these objectives differ markedly.

APEC TPOs also operate under different cultural norms – Knowledge Management strategies, which are effectively cultural in nature, have to take these differences into account.

Understanding Knowledge Management
Knowledge Management is not clearly defined. However there was a general understanding that Knowledge Management needs to combine an appropriate technology platform with changes to internal business culture and processes to encourage knowledge sharing and the use of these new tools. In the area of Information Technology the benefits arising from new technologies are often clearly documented and understood. However in the area of Knowledge Management the benefits of new approaches to knowledge transfer are less readily visible and therefore may not be adopted.

Technology
Although the TPOs all have distinct Knowledge Management strategies, there are many areas of commonality around technology platforms – especially in the areas of DMSs, CMSs and Internet strategies. Canada and New Zealand expressed the view that they had gained value from sharing ideas on DMS strategies with other users in their countries who use similar systems. There could be great value in APEC TPO Knowledge Management and Information Technology teams sharing information on a regular basis.

The areas that all TPOs seem to be placing most emphasis on are web-based strategies for enabling companies to access useful information faster. This is in the interests of making member SMEs more internationally competitive by giving them faster access to trade leads, market information and news. Examples of these include the Japanese, Korean and Hong Kong CMS systems, and the Canadian Virtual Trade Commissioner. All of these enable the individual SME to locate information of interest, and request updates that will be related to their area of business. This is an area where member TPOs could usefully share ideas on strategies that have worked, on appropriate technologies and on website set-ups. Collaboration is another newly developing area where TPOs are establishing communities of practice both internally and also with external parties.

Collaboration tools
Some of these collaboration tools are embedded in web portals, others are linked to DMSs. This is an area where TPOs can make considerable progress by sharing ideas with other TPOs on the range of pilot projects that have been under trial to date. Collaboration tools have the benefit of not only providing information to SMEs, but also enabling active shared feedback, which can be rapidly used to create valuable commercial strategies for SMEs. In this area considerable thought needs to be given to site content, security of information, access to the site, and protocols around use of the information.

Training
These new systems can involve significant change to existing work processes, and reasons for the changes and the benefits to the user need to be carefully explained. To get the best out of new technologies, a full training programme needs to be developed for users onshore and offshore. There was feedback that some new Knowledge Management technologies had only gained partial acceptance in offshore networks, because of inadequate communication and training.

Promoting use of tools
In promoting acceptance by users, most TPOs have followed a voluntary approach, hoping to show users benefits that will encourage them to adopt the systems. Korea, for example, has a model that is directly linked to performance reviews. If technology and Human Resources policies allow for such an approach, this would clearly bring benefits in enforcing the adoption of Knowledge Management systems.

Solutions that are very successful in some economies may not work elsewhere because of different cultural concerns. The open feedback models used in the US Skills and Expertise locator and the Mexican balanced scorecard may cause difficulties in societies where it is not the norm to give such open feedback.

Teams
Knowledge Management teams should work closely with internal Human Resources teams on training and performance issues. It is useful to incorporate desired Knowledge Management behaviours and targets into individual performance agreements, where these exist.

SURVEY

APEC SURVEY – BENCHMARKING KNOWLEDGE MANAGEMENT TECHNOLOGIES AND BEHAVIOURS

Earlier this year, the APEC Working Group on Trade Promotion (APEC WGTP) endorsed a Knowledge Management benchmarking project to be carried out by New Zealand Trade and Enterprise on behalf of APEC. The project was subsequently approved by the APEC Budget and Management Committee (APEC BMC) as a 2005 Trade and Investment Liberalisation and Facilitation (TILF) project.

Discussions among APEC WGTP have shown that many APEC Trade Promotion Organisations (TPOs) are heavily constrained by ineffective data management and information transfer systems. The project aims to help APEC Trade Promotion Organisations improve their knowledge and information sharing processes and technologies and to enable them to build the capacity of domestic companies to make more effective use of export opportunities.

New Zealand Trade and Enterprise welcomes your participation in this project sponsored by the APEC Working Group on Trade Promotional Organisations.

Questions are grouped into 7 sections. At the end of each section you will be asked for any other comments regarding that section. The questionnaire should take about 45 minutes to complete. It can be completed in stages.

If you have not received a formal invitation to complete the survey online or you have any questions about this survey please contact either Debbie Lange or Paul Vaughan at New Zealand Trade and Enterprise.

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GLOSSARY OF TERMS

Client Management Systems (CMS)
A family of software applications which enable organisations to better serve its customers through the introduction of reliable processes and procedures for interacting with those customers. Typically they record details of companies and contacts, relationships with these companies, and track prospects, clients, producers, mailing lists, and more.

Collaborative Tools
Software tools that enable both structured and free-flow sharing of knowledge and best practices. These could include collaboration tools within Intranets, or specialist software platforms. An example is Lotus Notes, instant messaging, on-line conferencing, threaded discussions, and discussion forums are all examples of approaches to collaboration.

Document Management Systems (DMS)
A family of software applications which enable the shared management of documents, including storage/archiving, cataloguing/indexing, security profiles, search and retrieval etc.

Intranet
Typically the term refers to the internal web site of a company which is used to host a series of papers of use to internal staff, but which are not accessible to an external audience. If parts of the Intranet are made available to outside parties, it is known as an Extranet.

Library Management System
Library holdings were traditionally paper card based, but increasingly even small professional libraries have invested in software applications to record books and journals, manage subscriptions, library loans etc. some systems are Internet based and suitable for deployment across global organisations.

Offshore
The network of offices in economies other than the national base of the organisation.

Onshore
The network of offices within the national economy of the organisation.

Records management system
This is a family of software applications, designed to assist in record keeping to meet audit and archive requirements. Modern systems are often integrated into the DMS. The Records Management System typically also records details on paper record holdings, as well as the electronic records held in the DMS.

Retention and disposal of records
Some government s have legislative requirements based around the need to maintain a National Archive, and therefore public agencies have expectation about the length of time that they must keep documents and then hand-on a selected group for inclusion in the National Archive.

Website
A website or web site (often shortened to a site) is a collection of web pages that is, documents accessible via the WWW on the Internet. The pages of a website will be accessed from a common root URL, the homepage and usually reside on the same physical server.

SECTION 1 - YOUR ORGANISATION
This section contains general questions relating to your organisation.

Please state the name of your organisation.

What is your organisation's mission?

What other Government or Economic Development Agencies in your country are involved in Trade Promotion? (Please state below.)

How many staff do you have located onshore or within your country?

How many staff do you have located offshore or overseas?

How many staff do you have in total?

How many offices do you have located onshore or within your country?

How many offices do you have located offshore or overseas?

How many offices do you have in total?

What are your organisation's key sources of revenue? (Please state the revenue type and amount for each type in your local currency.)

What is the total operating budget of your organisation? (Please state amount in your local currency.)

What are your organisation's key performance indicators?

You have reached the end of Section 1. Do you have any other comments about your organisation?

SECTION 2 - DEFINING KNOWLEDGE MANAGEMENT

The phrase 'Knowledge Management' can mean many different things. For the purpose of this survey, we are proposing to think of Knowledge Management in a broad context.

Knowledge Management is the process through which organisations generate value by being able to more effectively use their intellectual and knowledge-based assets. These can include documents, data, reports etc but also include all the human "know-how" that lives in a business (known as "Tacit" knowledge). Most often, this involves sharing knowledge among employees, departments and with other companies that we work with. While Knowledge Management is often made easier by having appropriate technology, the technology is only a tool to use in unlocking KM potential in an organisation.

Karl-Erik Sveiby, a noted Knowledge Management expert, has identified two "tracks" of Knowledge Management:

- *Management of Information. For researchers in this track, knowledge = objects that can be identified and handled in information systems.*
- *Management of People. For researchers and practitioners in this field, knowledge consists of processes, a complex set of dynamic skills, know-how, etc that is constantly changing.*
-

This questionnaire focuses on both aspects of Knowledge Management.

How would you define Knowledge Management?

Do you think Knowledge Management is more about organisational culture, technology, people or content?

How important is knowledge in a Trade Promotion Organisation?

Very important	☐
Somewhat important	☐
Not very important	☐
Not at all important	☐
Don't know	☐

What is the role of Knowledge Management in a Trade Promotion Organisation?

What are your organisation's current Knowledge Management issues?

Does the term 'Knowledge Management' appear in strategy or general management documents within your organisation?

Yes	☐
No	☐

You have reached the end of Section 2. Do you have any other comments about defining Knowledge Management?

SECTION 3 - KNOWLEDGE MANAGEMENT STRATEGIES

Some organisations will have a designated Knowledge Management team, and a formal Knowledge Management business plan, which may focus on knowledge sharing issues and actions and strategies to improve knowledge flows. Other organisations may not treat Knowledge Management as a separate business unit, but may still have elements of Knowledge Management Strategies incorporated into other business plans and processes.

This section contains questions relating to Knowledge Management strategies and how you have identified Knowledge Management issues within your organisation.

Does your organisation have a Knowledge Management strategy or programme?

- Yes ☐
- No ☐
- No, but plan to in the next 2 years ☐
- No, do not plan to ☐
- Unsure ☐

This question only applies if you have not implemented a Knowledge

Do you have any Knowledge Management components within your Information Technology strategy or programme?

- Yes ☐
- No ☐

If yes please give details.

These questions only apply if you have implemented a Knowledge Management strategy or programme.

What is the MAIN reason your organisation has established a Knowledge Management strategy or programme?

Which group within your organisation was the MAIN group responsible for establishing a Knowledge Management strategy or programme?

- Board Level ☐
- Senior Management ☐
- Middle Management ☐
- Trade Commissioners ☐
- Corporate Group ☐
- Strategy Group ☐
- Information Technology ☐
- Human Resources ☐
- Communications ☐
- Employees ☐
- Government ☐
- Other ☐

Is your Knowledge Management strategy or programme widely known and supported within your organisation?

- Very widely known and supported ☐
- Quite widely known and supported ☐
- Not widely known and supported ☐

What is the annual budget of your Knowledge Management strategy or programme as a percentage or your organisation's total budget? Do you expect this to increase, decrease or remain the same as this year? (Please state the revenue type and amount for each type in your local currency.)

Do you have a group or team within your organisation which is responsible for the implementing Knowledge Management initiatives?

Yes ☐
No ☐

You have reached the end of Section 3. Do you have any other comments about Knowledge Management Strategies?

SECTION 4 - KNOWLEDGE MANAGEMENT TECHNOLOGIES AND INITIATIVES
The following questions relate to technologies and initiatives adopted to enable the flow of information and knowledge throughout your organisation.

Knowledge Management tools cover a wide range of IT solutions from standard document and e-mail storage packages to sophisticated collaboration tools designed to support community building and identity across an organisation. Systems can be developed in-house or purchased off-the-shelf. Generally, tools fall into one or more of the following categories: knowledge repositories, such as Document Management Systems; expertise finding tools; collaboration tools such as discussion and instant messaging technologies, and searching and data mining tools.

Knowledge Management tools are normally introduced to meet specific business needs, and the range of tools that any organisation will have is directly related to their own business needs, size and locations. We have asked a range of questions relating to each of the main types of Knowledge Management information technologies and initiatives that you may have within your organisation or are planning to implement. The list is not exhaustive.

Have you implemented a Document Management System within your organisation?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

These questions only apply if you have implemented a Document Management System

When did you first implement a Document Management System? (Please select only one.)

- <1 year ago ☐
- 1-2 years ago ☐
- 2-3 years ago ☐
- 3-5 years ago ☐
- >5 years ago ☐

What Document Management System product/software do you use?

Who has responsibility for managing the Document Management System? (Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Document Management System? (Please specify business unit and/or position title of the individual(s) responsible.)

Is your Document Management System accessible from both onshore and offshore?

- Onshore only ☐
- Offshore only ☐
- Onshore AND offshore ☐

Is it mandatory for staff to save documents into the Document Management System?

- Yes ☐
- No ☐

Is saving documents into the Document Management System a manual or automatic process?

- Manual ☐
- Automatic/System Generated ☐
- Manual AND Automatic/System Generated ☐

Have you implemented a Client Management System within your organisation?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

These questions only apply if you have implemented a Client Management System

When did you first implement a Client Management System?

- <1 year ago ☐
- 1-2 years ago ☐
- 2-3 years ago ☐
- 3-5 years ago ☐
- >5 years ago ☐

What Client Management System product/software do you use?

Who has responsibility for managing the Client Management System? Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Client Management System? (Please specify business unit and/or position title of the individual(s) responsible.)

Is your Client Management System accessible from both onshore and offshore?

- Onshore only ☐
- Offshore only ☐
- Onshore AND offshore ☐

Is it mandatory for staff to save information into the Client Management System?

- Yes ☐
- No ☐

Is saving information into the Client Management System a manual or automatic process?

- Manual ☐
- Automatic/System Generated ☐
- Manual AND Automatic/System Generated ☐

Have you implemented an Intranet within your organisation?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

These questions only apply if you have implemented an Intranet

When did you first implement an Intranet?

- <1 year ago ☐
- 1-2 years ago ☐
- 2-3 years ago ☐
- 3-5 years ago ☐
- >5 years ☐

Who has responsibility for managing the Intranet? (Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the Intranet? (Please specify business unit and/or position title of the individual(s) responsible.)

Is your Intranet accessible from both onshore and offshore?

- Onshore only ☐
- Offshore only ☐
- Onshore AND offshore ☐

Please list the top five things your Intranet is used for in order of highest use to lowest use.

Does your organisation have a website?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

These questions only apply if you have implemented a website

If you have implemented a website, please list the url address(s) below. (http://www.....)

When did you first implement a website?

- <1 year ago ☐
- 1-2 years ago ☐
- 2-3 years ago ☐
- 3-5 years ago ☐
- >5 years ago ☐

Who has responsibility for managing the website? (Please specify business unit and/or position title of the individual(s) responsible.)

Who has responsibility for training staff on how to use the website? (Please specify business unit and/or position title of the individual(s) responsible.)

Please list the top five things your website is used for in order of highest use to lowest use.

The following questions apply to all

Do you have any Government record keeping requirements?

- Yes ☐
- No ☐

If yes, please describe your Government record keeping requirements.

Do you have a Records Management policy?

- Yes ☐
- No ☐

Are your records predominantly paper or electronic?

- Paper ☐
- Electronic ☐

Have you implemented an electronic Records Management System within your organisation?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

What Records Management System product/software do you use?

Do you have a File Classification System?

- Yes ☐
- No ☐

If you have a File Classification System, is it based on a functional or organisational structure? (Please describe.)

Who has responsibility for Records Management in your organisation? (Please specify business unit and/or position title of the individual(s) responsible.)

Have you implemented an Online Library Management System within your organisation?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

If you have implemented an Online Library Management System, does this include material held in your offshore offices?

- Yes ☐
- No ☐

Do you have a physical library within your organisation?

- Yes ☐
- No ☐

If you have a physical library, is your library open to your clients, general public or just staff. (Please select all that apply.)

- Staff ☐
- Clients ☐
- General Public ☐

Have you implemented any tools that specifically enable collaboration within the organisation and with external parties?

- Have implemented ☐
- Are planning to implement ☐
- Are not planning to implement ☐

Please describe each collaborative tool and its core function.

Who has responsibility for managing collaborative tools within your organisation? (Please specify business unit and/or position title of the individual(s) responsible.)

Do you have a policy within your organisation around capturing and archiving emails?

- Yes ☐
- No ☐

What are the key components of your email policy?

Please indicate in the spaces provided if you have or plan to implement the following initiatives within your organisation.

	Have implemented	Are planning to implement	Are not planning to Implement
Central repository of research undertaken	☐	☐	☐
Central repository of presentations or documents	☐	☐	☐
Central repository of best practices, guidelines and manuals	☐	☐	☐
Knowledge map of staff skills and expertise	☐	☐	☐
Knowledge management training and awareness	☐	☐	☐
Communities of Practice	☐	☐	☐
Project debrief system to capture lessons learnt	☐	☐	☐

Social Network Analysis ☐ ☐ ☐

Do you have a group or team within your organisation which is responsible for undertaking research?

Yes ☐
No ☐

What are the core research databases and resources your organisation uses? (Please list in the space provided below.)

Does your organisation share information with other Government agencies?

Yes ☐
No ☐

If yes, please list the Government agencies your organisation shares information with and the type of information shared.

Do you have an automatic system for capturing and forwarding trade opportunities to companies?

Yes ☐
No ☐

If you have an automatic system for capturing and forwarding trade opportunities to companies, please describe.

What is the MAIN contact point within your organisation for exporters and companies?

Website ☐
Offshore office ☐
Account manager ☐
Telephone call centre ☐
Other ☐ Please specify

You have reached the end of Section 4. Do you have any other comments about Knowledge Management technologies and initiatives?

SECTION 5 - MEASURING KNOWLEDGE MANAGEMENT INITIATIVES
The following questions relate to measuring the success of your Knowledge Management initiatives, whether large or small.

Knowledge Management has become an important area of focus for many organisations but measuring the benefits of a new Knowledge Management strategy may be hard to assess. This stems from the fact that, since knowledge is intangible, there may be no direct link from an improved Knowledge Management process to an obvious and related business outcome.

It may be easier to think of the success of Knowledge Management initiatives in terms of "hard" and "soft" benefits. The "hard" benefits of a Knowledge Management initiative are directly related to financial performance and would include such things as reduced costs of operation, labour savings, securing additional business, Return on Investment, contribution to profit, etc. The "Soft" benefits might include aspects such as enhanced cooperation between departments or separate business units/ locations; accelerated innovation: achieving higher customer satisfaction; reduced exposure to risks; quality improvement; increased teamwork; increased speed and responsiveness; and better decision making.

Other intangible benefits could include: increased employee retention; employees better connected to the experts; improved work routines; process improvement, and the organisation being more aware, involved, and focused on its core strategy.

Does your organisation have a formal method for measuring the success of your Knowledge Management initiatives?

Yes ☐
No ☐

In your opinion, what are the most important factors for the success of a Knowledge Management initiative?

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST SUCCESSFUL imitative and why? (Please describe.)

If your organisation has implemented a Knowledge Management initiative, either large or small, what has been the MOST UNSUCCESSFUL imitative and why? (Please describe.)

Has your organisation encountered any resistance to implementing a Knowledge Management initiative? (Please describe.)

You have reached the end of Section 5. Do you have any other comments about measuring Knowledge Management initiatives?

SECTION 6 - KNOWLEDGE MANAGEMENT BEHAVIOURS

IT solutions often need to be supported by changes in behaviour to ensure that knowledge is shared and documents are placed into shared repositories.
This section is looking at behaviours relating to Knowledge Management within your organisation, and whether you have any strategies in place to try and foster better collaboration and sharing.

How would you describe the knowledge culture in your organisation?

Do you think there are any cultural/national barriers to sharing knowledge that are specific to your organisation?

Do you think knowledge sharing behaviours should be rewarded?

- Yes ☐
- No ☐

Is knowledge sharing and using key Knowledge Management systems part of individual performance management assessments or reviews within your organisation?

- Yes ☐
- No ☐

Does your organisation provide rewards to staff that share, contribute and use key Knowledge Management systems?

- Yes ☐
- No ☐

If your organisation provides rewards to staff that share, contribute and use key Knowledge Management systems, please specify what these include.

Does your organisation have a formal induction program?

- Yes ☐
- No ☐

Does your organisation have a formal mentoring or coaching program?

- Yes ☐
- No ☐

Is the annual turnover of staff in your organisation considered to be low, medium or high?

- Low ☐
- Medium ☐
- High ☐

Does your organisation conduct exit interviews with staff that leave your organisation?

- Yes ☐
- No ☐
- Sometimes ☐

If your organisation conducts exit interviews with staff that leave the organisation, please describe how this information is captured and used.

You have reached the end of Section 6. Do you have any other comments about Knowledge Management behaviours?

SECTION 7 - ABOUT YOU
The following questions relate to you.

What is your job title?

What are your key responsibilities? (Please describe.)

How long have you been in your current position within your organisation?

- <1 year ☐
- 1-2 years ☐
- 2-3 years ☐
- 3-5 years ☐
- >5 years ☐

Have you held any other positions within your organisation?

- Yes ☐
- No ☐

If you have held other positions within your organisation please list below.

You have reached the end of the questionnaire. Do you have any other comments to make about Knowledge Management within your organisation?

GLOSSARY OF TERMS

Client Management Systems (CMS)
A family of software applications which enable organisations to better serve its customers through the introduction of reliable processes and procedures for interacting with those customers. Typically they record details of companies and contacts, relationships with these companies, and track prospects, clients, producers, mailing lists, and more.

Collaborative Tools
Software tools that enable both structured and free-flow sharing of knowledge and best practices. These could include collaboration tools within Intranets, or specialist software platforms. An example is Lotus Notes, instant messaging, on-line conferencing, threaded discussions, and discussion forums are all examples of approaches to collaboration.

Document Management Systems (DMS)
A family of software applications which enable the shared management of documents, including storage/archiving, cataloguing/indexing, security profiles, search and retrieval etc.

Intranet
Typically the term refers to the internal web site of a company which is used to host a series of papers of use to internal staff, but which are not accessible to an external audience. If parts of the Intranet are made available to outside parties, it is known as an Extranet.

Library Management System
Library holdings were traditionally paper card based, but increasingly even small professional libraries have invested in software applications to record books and journals, manage subscriptions, library loans etc. some systems are Internet based and suitable for deployment across global organisations.

Offshore
The network of offices in economies other than the national base of the organisation.

Onshore
The network of offices within the national economy of the organisation.

Records management system
This is a family of software applications, designed to assist in record keeping to meet audit and archive requirements. Modern systems are often integrated into the DMS. The Records Management System typically also records details on paper record holdings, as well as the electronic records held in the DMS.

Retention and disposal of records
Some government s have legislative requirements based around the need to maintain a National Archive, and therefore public agencies have expectation about the length of time that they must keep documents and then hand-on a selected group for inclusion in the National Archive.

Website
A website or web site (often shortened to a site) is a collection of web pages that is, documents accessible via the WWW on the Internet. The pages of a website will be accessed from a common root URL, the homepage and usually reside on the same physical server.

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