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Seducing, engaging and supporting communities at Achmea

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Abstract

This paper discusses the development of sponsored communities of practice at Achmea and their contribution to the strategic objectives of the organization. The development process, based on the empowerment of communities, stresses the role of the participants. The paper introduces the SES model (seduce, engage, support) for the development of CoPs. The distributed nature of CoPs at Achmea imposes extra demands and requirements on their design. The paper also discusses specific aspects related to the support of distributed communities, and methods to facilitate collaboration management in distributed settings.

1. Introduction

Communities of Practice (CoP) are groups of people who come together to share and to learn from one another, face-to-face and virtually. They are held together by a common interest in a certain area, and are driven by a desire and need to share problems, achievements, insights, tools and best practices. CoP members deepen their knowledge by interacting on an ongoing basis and will, over time, develop a set of shared practices (Wenger et al., 2002). The following characteristics are usually associated with CoPs:

- Stimulate interaction
- Decrease the learning curve of new employees
- Provide a forum for member to help each other solve everyday problems
- Development and dissemination of best practices, guidelines and procedures
- Respond more rapidly to customer needs and inquiries
- Reduce rework and preventing “reinvention of the wheel”
- Creating new ideas for products and services

Although CoPs are not new and have existed in a variety of forms probably since mankind is around, only recently organizations have discovered the potential of CoPs to the sustainable advantage of business practice, the realization of strategic objectives and improvement of organizational performance.

It is commonly agreed that CoPs have the potential to overcome the inherent problems of a slow-moving traditional hierarchy in a fast-moving virtual economy, the ability to handle unstructured problems and to share knowledge outside of the traditional structural boundaries, and that CoPs provide adequate means of developing and maintaining long-term organizational memories. On the other hand, problems can arise from voluntary participation of its members and CoPs are not always targeted to the collection and transfer of knowledge.

This means that an approach to the CoPs creation and management must combine the positive knowledge sharing capabilities of CoPs with manageable task solving and orientation to business processes.

In this paper we describe why CoPs are important at Achmea and how Achmea nurtures and organizes CoPs within the organization. The paper is organized as follows: In the next section we will introduce the current status of CoP developments at Achmea. In section 3, the SES model used and developed at Achmea to create CoPs is introduced. In section 4 we use an example CoP to demonstrate the method and in section 5 we present a model to support collaboration in distributed communities. Finally, in section 6 we present our conclusions and point areas for further research.

2. Communities of Practice at Achmea

The Achmea Holding, currently one of the top 3 insurance groups in the Netherlands, originates from the merge between a large number of companies, active in the insurance and financial services field. Achmea realizes that a flexible, innovative and personal response to the requirements of customers is in great demand in financial services, insurance, security and health care. Since 2001 the central theme of the mission is summarized in the slogan 'Achmea unburdens'. The realization of this claim has large consequences for the structure and processes of the organization and the transformation movement it originated. On one hand, processes are being harmonized across the organization, and on the other hand, Achmea strives to achieve larger synergy between people across the different business units. The current organizational structure, based on business unit independence, is not always conducive for the realization of synergy. Novel and flexible organizational structures are therefore needed, of which CoPs are a good possibility.

We follow the dual principle that, on one hand, communities must contribute to the realization of the strategic priorities of the company, resulting in the explicit specification and monitoring of targets and objectives of a CoP, in collaboration with community members. On the other hand, communities must be developed in a participatory way involving members and stakeholders. Even though CoPs are of great value for Achmea, experience shows that forcing top-down the creation of communities does not work if the target group does not already have any common interests, activities and objectives (Gongla, Rizzuto, 2001). At the bottom line, support of communities must focus on the building of social capital (including trust, norms, reciprocity, identity), as this provides a continuous basis for sustainable advantage and innovation.

CoP literature often distinguishes between two types of communities: **self-organized** and **sponsored**. Self-organizing CoPs are created bottom-up, by the members, as a way to watch over and organize their own interests. They are extremely flexible and volatile, the downside being that they easily collapse when their motor for some reason disappears, or if too much outside pressure is placed on the community.

Sponsored communities, on the other hand, are expected to produce measurable results agreed previously with their sponsors. The internal structure of a sponsored CoP must be decided by the members within a formal agreement with the management.

Achmea chooses to identify groups - active in areas essential for the core business - that exhibit some of the characteristics of self-organization and actively support and organize their activities. The process of matching community goals and interests to organizational strategic aims can only succeed if community members are convinced of the possible targets and organizational benefits of community activities and if there are active and explicitly involved

in the shaping up of the CoP. When self-organizing communities became sponsored communities with clear targets and outward-directed activities, the need arises for the CoP to develop a clear profile of themselves as group. That is, the community develops an identity of its own, centered around its achievements and targets. The development of an own identity is therefore an important means of connection within a group and provides an adequate interface for communication with the outside world.

3. The SES Model for community facilitation

The above sections make clear that CoPs are of great importance for Achmea due to their potential to contribute to synergy across business units. Several CoPs have been initiated or are currently under development. These projects confirm that motivation of the management and the employees, as well as the choice of infrastructure for collaboration, communication and information are crucial for the success of CoPs.

The **SES (Seduce, Engage, Support) Model** was developed at AKN to facilitate CoPs across the organization. SES is a participatory method and borrows ideas from community-centered development (Preece, 2000) in the sense that the characteristics and needs of the community members are leading and prior to any decisions concerning technology and social structure. The aim of the model is to combine lessons learned, success stories and collective experiences, skills and tools from previous projects, in a way that is easily identified and understood by the organization. In this section the SES model is first introduced in a generic way, and after each of its components is explained in more detail. The main contribution of the method is its simplicity and adaptability to the needs of different groups.

The SES model identifies four groups of actors involved in the activity and development of a community:

- **Initiators:** the individuals who realize that the organization can profit from the nurturing and encouragement of such a group and take lead on the creation of the CoP.
- **Members:** The persons that participate in the CoP, and whose mutual concerns, interests and activities form the body of the community.
- **Stakeholders:** the group who can affect or be affected by the results and policies of the CoP.
- **Organization:** The corporate context in which the CoP is inserted. Within this group, decision makers play a special role and are often referred to explicitly in the model.

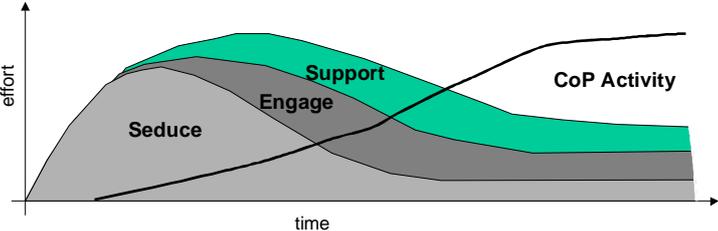


Figure 1: The activity phases of the SES model

After the initial awareness, the development of CoPs evolves along three main phases. During the first phase, **seduction**, the context and aims of a CoP are identified and described, potential members are made aware of their connections and common interests or objectives, and the community is advertised to the organization. In the second phase, **engagement**, both communities members and organization are involved in the process of setting up the CoP. The aim is to design a community that is as closely related as possible to the requirements and wishes of the members and which tasks and targets are well embedded in the strategic priorities of the organization. The third phase, **support**, is geared to the

consolidation and continued evolution of the CoP. Figure 1 gives an overview of the development phases throughout the life of a CoP.

3.1 *Seduce*

The aim of the Seduce phase is to create a feeling of anticipation about the CoP on both its potential members as the organization as a whole. The phase also aims at the clarification of the context and objectives for the CoP. One of the first activities in the Seduce phase must therefore be the identification of the target groups: initiators, stakeholders, members, organization. The activities of the Seduce phase are described in table 1.

Table 1: Activities during the Seduce phase of CoP development

Target group	Activities	Aims	Tools
Initiators	- contact members and stakeholders	- guide CoP development - describe CoP purpose, aims, members	brainstorm
Stakeholders	- Interviews - Organize group discussions	- Clarify CoP purpose - Define CoP targets - Make context explicit	Acceleration Room ¹ Questionnaires
Members	- Organize meetings - Form pilot group	- Introduce CoP concept - Increase awareness - Develop trust - Identify common interests	Acceleration Room ¹ Mood boards ²
Organization	- Elicitation of members - Publicity campaign	- Show added value of CoP - Attract new members - Secure support	Intranet Newsletters

Although the order of activities is not fixed, and indeed Seduce activities will continue well into the CoP lifecycle in order to keep the excitement and involvement of members and stakeholders alive, it is usual to start this phase with activities directed to the stakeholders. In this way, their objectives, concerns and targets for the community which form the basis for the participation of members, are identified and agreed upon at an early stage. However, in the development of any community, the members and their view on the organization and content of the CoP are central. The process of re-accessing and consolidating CoP aims and activities is therefore dynamic and must be a constant part of the community lifecycle.

In later stages of development of a CoP, seduce activities are geared at the publicity and distribution of results and actions, so that the support for the groups is maintained and funding secured. The generation of quick wins at a early development stage is therefore crucial. Successes of one CoP are a great buster for other CoPs and for groups which are considering the creation of CoPs.

3.2 *Engage*

This step of development of CoPs is geared to the involvement of all target groups in the further shaping up of the CoP. The aims of the Engage phase for each of the target group are summarized in table 2.

¹ Acceleration Room allows the rapid inventory of characteristics and aims of an issue (in this case the CoP) and helps create common focus.

² Mood boards are visual tools (posters) used to express the look and feel characteristics of a certain object. They are effective tools to share individual concerns and support the discovery of the common identity of a group.

Table 2: Activities during the Engage phase of CoP development

Target group	Activities	Aims
Members	<ul style="list-style-type: none"> - Interviews of pilot group - Group synopsis sessions - Identification of requirements and functionality 	<ul style="list-style-type: none"> - insure involvement - enable group's identification - link CoP to member objectives - Identify functionality requirements
Stakeholders	<ul style="list-style-type: none"> - Group synopsis sessions - Group discussions 	<ul style="list-style-type: none"> - Agree on targets and processes - Appoint champion - Identify functionality requirements
Organization (Decision-makers)	<ul style="list-style-type: none"> - Make CoP objectives explicit - Identify strategic priorities 	<ul style="list-style-type: none"> - Match CoP aims to strategic priorities

In our experience, identity is a key issue for individual participation in a group. This means, both the development of a group identity, as well as the assurance that individual objectives and concerns are incorporated in the objectives of the CoP. People need to get a clear, positive answer to the question ,what's in it for me' in order to adopt the CoP as their own. The focus of the Seduce phase towards CoP members is to involve them from the very beginning of the development of the CoP and make sure that personal requirements and desires are incorporated in the functionality and targets of the CoP. Towards the engagement of stakeholders and organizational decision-makers, activities are twofold: (1) appointing a champion will assure the bridge between the CoP and the organization, and (2), define a clear and explicit link between the targets of the CoP and the strategic objectives of the organization what helps clarify the benefits of the CoP towards decision-makers, and insure their support.

The engagement process is a continuous one, to be kept throughout the lifecycle of the community. In the Engage phase stress is placed on the specification of measurable characteristics of the CoP and reward/sanction systems for participation. Another method used is the identification of the group's synopsis. Furthermore, CoP members can also offered training on the development of a critic attitude towards each other and towards the objectives of the community.

3.3 Support

Once a CoP has been identified, and participants and stakeholders are engaged in its formation, active support for the CoP is fundamental for its further success. By support we mean the facilitation of community activities in terms of infrastructure, funding, social structure and monitoring.

Infrastructure. Infrastructure support includes (1) the creation and facilitation of time and space for CoP activities, so that members are enabled to participate in community life and meet others, and, (2) the availability of a technical infrastructure to back up CoP targets and activities. The existence of adequate information and collaboration support systems is an important aspect, but not a self-sufficing one. In our approach, we concentrate on the formation of the community, and are only starting the development of ICT after its requirements and functionality are agreed upon and shared by the group which is going to use it. Furthermore, support systems must fit with the specific characteristics of the CoP. We have developed a conceptual framework for interaction support systems that meets this requirement, which is described in section 5.

Funding. Like most things in life, a well functioning community will need funds to back up its activities. Crucial items are meetings, training and the implementation of a sound infrastructure. In order to secure funding, the activities related to the engagement of stakeholders and organization as described above are of great importance. The community itself contributes to the continuation of these engagement both by being accountable and

reporting on the usage of funds, as well as by maintaining an explicit link of its activity to strategy and goals of organization. When the targets and expectations on a CoP are well set and realistic, their achievement will have positive consequences to company revenues and therefore justify funding of the CoP.

Social structure. The activity and achievements of CoPs are much influenced by its social organization. Therefore, the design of a social structure for the CoP must go beyond the identification of members, and their requirements and preferences, but include the specification of the social structures (roles and communal behavior norms) and interactions between actors (de Moor, 1999). The enactment of social roles results often in the success or failure of a community. This is especially so for the role of CoP leader or facilitator, and special care must be taken on the his/her appointment. The following are roles usually present in CoPs:

- leader/facilitator
- content manager
- web manager
- events coordinator
- trainer

Monitoring. Finally, the support of a CoP should include the specification and realization of processes that monitor the activity of the CoP. Monitoring activities check how well the CoP is meeting its targets, whether members are satisfied with CoP activities, and provides a way for change and continuous adaptation to a changing environment. Monitoring will as well ensure the engagement of stakeholders and corporate management. Monitoring objectives and tools are community specific and should be agreed upon by its members.

4. KennisNet: an example CoP

In this section, we apply the SES model to the development of the KennisNet CoP. KennisNet brings together non-life insurance developers and actuaries working at different business units. KennisNet was one of the first communities created at Achmea and lessons learned from its development process contributed greatly to the development of SES. Initiators for this CoP were members of the Knowledge Center Non-Life who realized that knowledge was not being optimally used because people working in different units did not know each other and were re-inventing the wheel and using external consultants on issues that could be helped by colleagues on other units. In the next subsections we briefly describe the three steps of the model. In particular, we will describe the support phase, which required special attention due to the distributed character of KennisNet.

4.1 Seduce

Early in the process it was clear that potential members should be made aware and enthusiastic for the community. The initiators visited most groups, initiated email discussions and organized workshops geared to the potential members in order to

- make them aware of the activities of related groups in other units,
- whenever possible, get people to meet each other,
- show the added-value of collaboration, and,
- create a feeling of community among the group.

It must be noted that, at the time, the need to include stakeholders and organizational decision makers in the Seduce process was not well understood. The development of KennisNet occurred therefore mainly outside the view of the top management, which has caused a need

for constant reassurance and explanation of the needs and results of the CoP. This has led to the improvement of the Seduce phase, and currently stakeholders and decision makers are actively and explicitly involved in the development of other communities, as now specified in SES.

4.2 Engage

Once the idea of KennisNet was well known to the members and its purpose known in general terms, a group incorporating representatives of each unit was established with the objective of formulate the objectives, structure and activities of the CoP. Members of this steering group would report back to their unit colleagues and bring their input into the steering group. Special attention was given to the development of a common classification for knowledge on the non-life insurance field.

Furthermore, a quick-off meeting for all members was organized well in the beginning of the development process, which helped the formation of community identity and set the tone for the quarterly workshops that would become part of the KennisNet structure.

4.3 Support

At an early stage was decided that besides activities and processes to help people get in contact and collaborate across business units, KennisNet would need to implement a repository to collect and distribute knowledge sources to its members. A main reason for this repository was to keep a memory of organizational knowledge on the non-life field (Achmea is the largest car insurer in the Netherlands, and one of the biggest home and calamities insurer) to be used asynchronously and to be kept for future use.

The structure of KennisNet combines face-to-face contacts between members of the group, formalized as quarterly workshops, with an intranet-based knowledge sharing server. An intranet-based knowledge repository was implemented based on the existing technical infrastructure, a Lotus Notes network. The functionality of Lotus Notes is used to support direct access to contents, as well as publishing and browsing of knowledge items. The repository of KennisNet, inspired by work on knowledge repositories and organizational memories (cf. Domingue, Motta, 1999), allows for the implementation of facilities for discussion and broadcast of questions and requests.

An user satisfaction survey was conducted by researchers of the University of Twente after the system was running for one year. The two main conclusions from this survey are:

- the face-to-face structure is well appreciated and its value clear
- the added value and potential of the knowledge server is not always clear to the users and the server is hardly used.

The main reason for this lack of use, as pointed in the survey, is that users need a more personal means of interaction to make them comfortable exchanging knowledge. The survey also indicates that knowledge owners prefer to share their expertise within a controllable, trusted group under conditions negotiated for the specific situation and partners.

Other recent studies also show that success of knowledge sharing is dependent on the level of trust and dependency between community members and on the kind of culture holding in the society (Ali et al., 2002). That is, users wish to keep the decision about sharing knowledge in their own hands, and want to be able to decide on a case by case basis whether an exchange is interesting to them or not, which is also explained by the need for reciprocity in knowledge exchange (Ahuja, Carley, 1998). Technology can facilitate knowledge sharing, but it is trust that enables it. That is, people will agree on sharing their knowledge with others if they feel

that they will gain something from the exchange. Therefore, the support system of KennisNet was extended to handle negotiation and realization of exchange agreements. In the next section, we will describe how knowledge sharing was improved in the KennisNet CoP and how technology was used in this process

5. Collaboration in Distributed Communities

Due to distributed nature of KennisNet and several other communities active and envisioned at Achmea, community support must rely for a large part on virtual, internet based, systems. Nurturing communities is hard enough when the members are in a single location with good connectivity and increase considerably when the members are spread around different locations, possibly in different areas and with different languages and cultures. Members of distributed communities are not always aware of each other's capabilities and often they will discuss their business problems with a direct colleague just because he/she happens to be conveniently close and not because he/she is the best person to consult with. Links between members of distributed CoPs can be strengthened by webs of communication technologies. Moreover, in distributed groups, although the common goal binding the members is long-term, contacts and relationships may be relatively fluid with members entering and exiting as their task needs evolve. In this scenario, collaboration will need to be based on concrete, explicit commitments making clear what each partner is supposed to contribute and expects from the others.

Agent technology is particularly well suitable to model collaboration management systems due to the autonomous, re- and proactive character of agents. Furthermore, agent concepts can lead to advanced functionality of KM systems (e.g. personalization of knowledge presentation and matching supply and demand of knowledge), and the rich representational capabilities of agents as modeling entities allow faithful and effective treatment of complex organizational processes. In our opinion, one of the main contributions of agent-based modeling of KM environments is that it provides a basis for the incorporation of individual initiative and collaboration into formal organizational processes. That is, a system does not need to be completely designed and fixed a priori but it is developed as a set of components and interaction processes that can be adjusted to the needs and requirements of the specific participants. We have developed a conceptual agent society framework, the OperA model, based on this principle of interaction between individual initiative and organizational structure. Due to space limitations we cannot describe OperA here but refer the reader to (Weigand et al., 2003).

Based on the survey results concerning the use of the repository and the user requirements for knowledge sharing, an extension to the KennisNet based on the OperA framework was proposed. The Knowledge Market is characterized by informal relationships between independent partners, interested to collaborate in a win-win way. A more detailed description of the Knowledge Market can be found in (Dignum, 2003). The Knowledge Market (depicted in figure 1) aims to support people exchanging knowledge with each other, in a way that preserves the knowledge, rewards the knowledge owner and reaches the knowledge seeker in a just-in-time, just-enough basis. Knowledge Market adds the following functionality to KennisNet:

- Possibility to share knowledge that is not available in the knowledge repository
- Support for coalition formation (in order to develop new solutions when knowledge is not available)
- Support for direct exchange between parties where the negotiation of exchange conditions happens in a case to case basis.

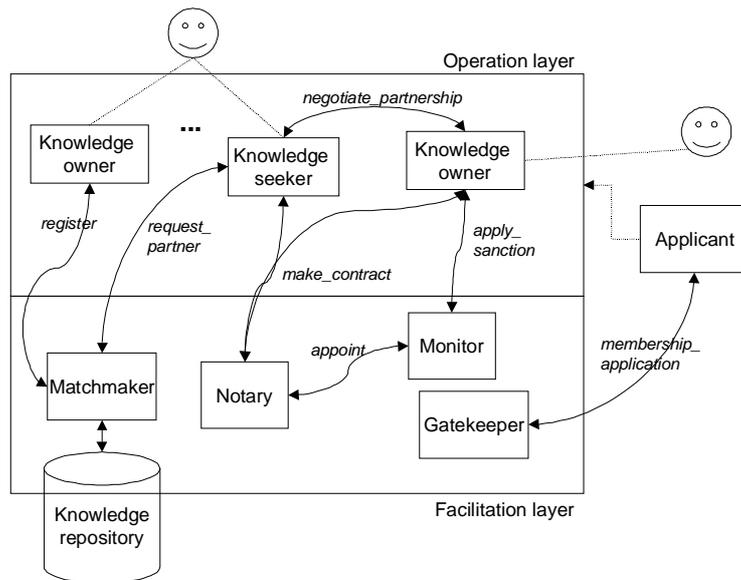


Figure 1: The social structure of Knowledge Market

People seeking collaboration through the Knowledge Market initiate a personal agent that acts as their avatar in the system. Several knowledge seeker and knowledge owner agents are typically active at any moment, and each user can own more than one agent simultaneously. This agent uses the preferences and conditions specified by the user to find appropriate partners and negotiate exchange terms. Depending on the specific task, the personal agent will take either the role of knowledge seeker or knowledge owner. Requirements concerning privacy, secrecy and competitiveness between brands and departments that influence the channels and possibilities of sharing are also described in the specification of the personal assistants.

Knowledge seekers and knowledge owners must first apply to enter the society. If this application is successful, the agent proceeds to the ‘observing’ scene. In this scene the agent is not active in any knowledge exchange but can access the repository, follow newsgroups, etc. Both seeker or owner agents can initiate an exchange by respectively announcing a need or a skill. The matchmaker agent helps seekers and owner to find the best match for their needs. Once seeker and owner are put in contact with each other, they will negotiate the terms of their exchange. If successful, such exchange contract is registered with the notary agent, who appoints a monitor agent to check the interaction between seeker and owner. Exchange contracts make interaction explicit and enforce reciprocity of actions, furthermore contracts can be checked to verify society activity.

The following example illustrates a contract between two members. In this fictive example, Anne will provide Bob with a report about competition prices, on the condition that Bob will give her comments on the report (which can help her prepare a upcoming presentation) and eventually share with her his new pricing concept for car insurance. This contract is generated during the ‘Negotiate partnership’ scene and registered in the ‘Register partnership’ scene. In this scene, the notary agent will assign a monitor agent to check the fulfillment of the contract between Anne and Bob. Monitoring can be a very simple activity, where status is checked when a deadline is reached. However, we have chosen to use an agent as monitor because monitors can take a more active role, reminding parties of approaching deadlines or by suggesting possible actions when sanctions occur. The clauses of this contract are informally specified as follows:

Interaction Contract: 'ID'	
Parties	Anne (A), Bob (B)
Clauses	<ol style="list-style-type: none"> 1. OBLIGED A TO receive(B, report-concurrent-prices) BEFORE <i>next-week</i> 2. IF received(B, report-concurrent-prices) THEN OBLIGED B TO (receive(A, comment-report-concurrent-prices) BEFORE <i>3-days</i> AND receive(A, concept-pricing) BEFORE <i>1-month</i>) 3. IF delayed(B, concept-pricing) THEN OBLIGED B TO inform(A, delayed(concept-pricing))

Figure 2: Collaboration contract example

6. Conclusions

In this paper we presented ongoing work on the development of sponsored communities of practice at Achmea. The development process is based on the empowerment of communities, and stresses the role of the participants. Our work resulted in the development of the SES method which is also presented in this paper. The model is now being applied to the creation of several CoPs (as illustrated using the KennisNet Cop) and best-practice on its use is being gathered. Since many of the communities at Achmea are spread across the business units special stress is placed on the support of distributed groups. Therefore, CoP support can be assisted by an agent-based architecture, OperA, to model interaction in communities. Further research will focus on the analysis of the results of application of the SES method to the development of several CoPs and its further refinement. We are further working on the development of a prototype for the OperA Model.

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