

Success Story

Consultants at Hatch Connect with Livelink ECM™

Redefining the Connection between Technology and Relationship Management

Managing relationships with clients and employees is crucial in the asset-intensive project delivery industry. Hatch has customers whose loyalty spans more than 50 years. Named again in 2008 as one of “Canada’s 50 Best Managed Companies” by a jury of management consultants, university business-school faculty, and a prominent business newspaper, Hatch has adhered to its value system of technical excellence and continuous improvement by providing high-quality, innovative, technically advanced, and comprehensive services to its clients and workforce when it met the demand for social networking and Web 2.0 technologies. Hatch chose Open Text’s Livelink ECM™—Communities of Practice to help unite its 8,700 consulting, design engineering, technology, environmental services, operations support, and project and construction management employees in the global mining, metallurgical, energy, and infrastructure sectors.

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*Glenn Sakaki,
Managing Director, Execution Technology*

as the company has grown in little more than a decade from a small firm of 500 people to a globally-distributed staff in 80 countries, we needed to provide other means by which individuals could collaborate and network on a global scale. The challenge is to quickly connect staff with other employees in the organization who retain specific knowledge on our clients, global practices, methodologies, and workflows—everything that we do as a company,” says Glenn Sakaki, Managing Director, Execution Technology at Hatch.

Hatch saw social networking and Web 2.0 technology as essential in addressing two critical concerns: the first was the capability to exchange information within a dispersed work force, and the second, that 20% of Hatch employees belong to Generation Y, the next generation of specialists and experts. Hatch recognized that Generation Y employees want to pursue ways to communicate beyond traditional email or formal document and data repositories. This new generation of workers has grown up using these technologies and they want to continue to use them at work. Mike Coles, Global Practice Director of Knowledge Management at Hatch, explains, “The challenge for us is to meet the demand for collaboration and the expectations of Generation Y and X who will be the majority of our workforce within the next 10 years. These people want to collaborate and want to work together to continue dialogue in meaningful ways beyond email.”

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Industry

Engineering, Construction,
and Operations

Customer



Business Challenges

- Leverage communications between 8,700 employees globally
- Increase competitiveness to retain a new generation of technologically advanced employees
- Appeal to Generations X and Y’s demand for social networking mediums
- Promote social interaction and collaboration

Business Solution

- Livelink ECM™—Communities of Practice
- Livelink Enterprise Server

Business Benefits

- Enhanced expert availability globally
- Increased ease of collaboration and information sharing
- Development of training programs
- Improved capture of specialized information for better accessibility

Leveraging an Open Text Investment to Communicate Globally

Open Text's Livelink ECM—Communities of Practice gives Hatch employees a place to share information about similar interests globally, unimpeded by geography. Web 2.0 technology allows a free-flowing, unstructured way to communicate. Sakaki says, "Two years ago, the majority of our knowledge sharing was fairly structured through our Open Text document repositories. We wanted to look at alternative ways in which we could encourage the exchange of knowledge within the company. Because of that, we became very interested in Communities and decided to move forward with some trials on the Livelink ECM—Communities of Practice module. After a few months, we recognized that it fit our culture, the way we work." Although Hatch had considered other products, the company wanted to leverage their existing investment with Open Text and was impressed with new capabilities for collaboration and retention of knowledge within the platform.

Hatch's trial of the Livelink ECM—Communities of Practice module scaled up quickly. With an initial purchase of 1,000 licenses, the company opened up Communities in April of 2007. Hatch started with 12 communities, but there are now 73, and the numbers are increasing exponentially as the technology catches on. Employee membership rose rapidly from a few users to several hundred in only six months.

Creating Communities to Free Knowledge

Any Hatch employee may request a community by accessing a folder called "Starting a Community" in Hatch's Knowledge Management Library. A questionnaire about the purpose, topics, members, content, facilitator, leader and name of the community must then be completed. Designated community leaders are responsible to the business of their particular community including membership, goal success, and questionable content. Coles says, "The approach is fairly open and free. I haven't had a need to really jump in and intervene in any of the communities for any reason. I'm not stopping people from starting communities, either. We give them advice; we ask lots of questions to start, but then let them go."

To manage the number of communities, Hatch has merged very similar communities but mostly allows the structure to manifest organically. "Fundamentally, communities succeed or fail based on the critical mass of members and content. Individual communities will grow and prosper or retire as required and then the content and members can be moved around. The content is not being pushed out from above; it's happening on an "as-required basis" from the shop floor," explains Coles.

Collaboration a Success

The tools used most frequently are forums, blogs for posting news and announcements, and Question & Answer (Q&A). Through the Navigation Panel, users can look up experts and also provide quick links to other places, links to their functional tools, or links to other web sites, for example. Communities may be public or private and are composed of groups of people who have a common interest, want to solve a particular



problem, or want to develop their knowledge in a specific area. Examples of communities at Hatch include Bulk Materials Handling, Sustainable Development, Business Management, and Climate Change.

Bulk Materials Handling, which is concerned with methods of transporting metal ores, was a multi-disciplined group that desired to share knowledge and experience within the team to improve their global capabilities. Having formed a community, they use it to develop a successful training course to qualify engineers as Bulk Materials Handling Specialists.

In another example, Hatch purchased a company involved in electrowinning technology which uses electricity to extract a metal from ores in solution. Although the company was small it harbored a lot of knowledge about the process that threatened to be lost as the principals of the company headed towards retirement. To capture their knowledge, Hatch created a 'library community' to capture and store this specialized information.

Members-only private communities may be formed by working groups for a short period of time so people can come together in a secure environment to solve a particular problem or issue.

Assessing the Right Cultural Fit and a Stable Platform

Businesses looking to implement Livelink ECM—Communities of Practice should examine two important considerations, according to Coles. “The first is to assess the cultural fit. This tool is for employees and I believe you have to allow them reasonably free reign to do what they want. If you are an organization that is very ‘command and control’ oriented I don’t think it will work. The second step is to have a stable platform from which the communities can operate. People will very quickly get turned off if there are bugs in the system, if the response time is rubbish, and if it doesn’t do what they expect it to. This includes the governance requirements in terms of people understanding where the boundaries are and having excellent training and user materials: I can’t stress that enough. We need to make sure that the user experience is great from the start.”

The Future is Mobile

The future management of Livelink ECM—Communities of Practice content, in terms of both retention and accessibility, is now being examined by Hatch. On the retention side, Hatch presently preserves all communities’ content and is looking at how to retire information. On the accessibility side, Hatch is considering some critical questions about the trend towards mobility and the related security matters. Although Hatch believes that Web 2.0 and social networking technology would be adapted more successfully in the corporate environment by allowing access beyond their firewall, concerns about security and discipline abound. Coles says, “We need to provide functionality to our younger generations, but at the same time, I think we’ve got to instill the understanding that this is a business environment and therefore a certain discipline applies. We might keep it in-house, within the organization, but I think eventually it’s going to leak. Also, if you introduce a more social approach to dealing with clients, that can have problems. It’s a matter of encouraging employees to use the technology but to teach them that there’s a different style of communication in business than there is in a social community outside.”

Sakaki adds: “When we look at external third party capabilities of communication tools and we are trying to find what we would call ‘safe corporate alternatives’ to them, we look to Open Text to provide a similar environment within our infrastructure, to help us set up those capabilities and allow our collaboration initiatives to move forward.”

Preserving Knowledge

As Hatch continues to explore social networking through Open Text Livelink ECM—Communities of Practice, Coles and Sakaki are confident that the uses and benefits will expand. Coles says, “I attended Hatch’s National Process Forum that brought together 150 of Hatch’s process engineers from Australia and South Africa. It actually had a breakout session to talk about Livelink ECM—Communities of Practice. To demonstrate how integral the tool is, I commented that we came to this great forum, caught up with some old friends, met some new people, listened to some interesting papers, and had some excellent discussions—but what was next? In general, email rules our lives at Hatch because we’re so geographically dispersed. I made the point of saying that we are now able to continue the discussions, the collaboration, and to store the information from the forum to revisit and share later, all thanks to Livelink ECM—Communities of Practice.”

With Open Text’s ECM solution, Hatch can benefit from the growing opportunities provided by social computing to support advanced collaboration while at the same time provide a secure and managed enterprise 2.0 environment for their content and intellectual property.

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