KNOWLEDGE PORTAL FOR A GLOBAL INVESTMENT FIRM

THE CHALLENGE

A major investment firm that manages over 250 billion USD in assets in a variety of industries across the globe engaged Enterprise Knowledge (EK) to fix their siloed information and business practices by designing and implementing a Knowledge Portal.

Siloed data scattered across multiple systems resulted in investment professionals wasting valuable time searching for the knowledge assets required to make fast, complete, and informed decisions. The firm manages a diverse portfolio of global assets and investments, with over 50,000 employees. Detailed records of these business deals existed as an incongruous mix of structured and unstructured information, located across multiple repositories. Even gaining access to much of this information required awareness it existed, as well as knowledge of whom to contact to be granted permissions.

To fill knowledge gaps caused by misplaced or inaccessible content, investment teams also commissioned research reports and studies to support their decision-making processes. However, these reports were seldom shared across the organization and, in fact, were often duplicated across teams. Additionally, since investment records were siloed based on division and investment types, the firm was not leveraging the vast expertise of its employees.

The firm recognized it needed a centralized way to find, view, and share its knowledge assets and connect staff to experts. The solution required improved visibility across data resources, access management practices, and the ability to connect with expert staff.

THE SOLUTION

EK designed, developed, and deployed an Enterprise Knowledge Portal, leveraging a suite of best-of-breed technologies. EK first conducted business case refinement sessions to understand, in depth, the problems that the Knowledge Portal needed to solve and its benefits to the firm, defining a series of personas, use cases, and user journeys to help prioritize key features along an Agile development plan. EK then developed the Agile roadmap for an MVP solution that would offer immediate value to the firm's staff and business ventures while proving the value of the Knowledge Portal, as well as the follow-on backlog of features for an enhanced solution that added to the value of the foundation model to be delivered iteratively.

Over the next year, EK worked side by side with the client's business and IT groups, as well as other third-party vendors in order to iteratively develop and test the solution. The MVP was delivered on time, and EK is now continuing development of the system, adding additional features and back-end sources in order to enrich the overall wealth of knowledge, information, and data within the system.

Overall, the Knowledge Portal delivers several first-of-its-kind features for the organization, including:

- Integration of structured and unstructured data, not just as links, but as displayed results that merge source materials for easy comprehension, analysis, and user action;
- Ability to understand and align complex security models, displaying only that content that should be accessible to each individual;
- Machine Learning and AI to provide highly customized views, automatically assembled based on the user; and
- Integration of all types of information with people, enabling individuals to find experts across the enterprise in a way that forms new connections and identifies new opportunities for collaboration.

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Of specific note, the portal's search application leverages a graph database modeled to integrate information from an extensive network of internal data sources for delivery in a single search result. For example, a single investment might combine information from as many as 12 different systems. In addition to the graph database, the portal leverages an insights engine powered by Artificial Intelligence (AI) that unifies siloed data and detects trends across repositories. The graph database and insights engine alike are powered by a semantic layer that maintains the relationships that users could take advantage of to traverse data sets existing across the enterprise, enhancing relevant content findability regardless of a user's business role. Additionally, EK mapped user roles to access and permissions to refine the firm's access controls, streamlining navigation of the firm's data, thereby reducing reliance on staff to determine levels of access and increasing the efficiency of knowledge discovery.

In support of the advanced technology and ongoing system enhancement, EK also focused on several key foundational KM topics to ensure the long-term success and adoption of the Knowledge Portal. These included content governance and a wide-ranging content cleanup, migration, and enhancement effort, taxonomy and ontology design accompanied by a tagging strategy, change and communications, and content type design. These activities and deliverables ensured that the content and data integrated within the Knowledge Portal could be trusted, was easily consumable both by human and machine, and would be maintained and further improved moving forward. Furthermore, the accompanying communications and education plan delivered an engaged and aware user base, ready to get value from the new tool.

THE EK DIFFERENCE

EK delivered every aspect of the Knowledge Portal solution using its own staff, deployed across three continents in order to support the client's global needs. EK brought a broad range of internal experts to bear for this initiative, including knowledge management experts, software engineers, solution architects, change and organizational design experts, taxonomist, ontologists, content strategists, and UI/UX designers and developers. This unique assortment of experts collaborated on every element of the initiative to ensure it leveraged EK's advanced methodologies and best practices and that the business stakeholders were engaged, aligned, and supportive of the new system.

This effort was also run leveraging true Agile principles to reduce risk and optimize stakeholder engagement and comprehension of the complex initiative. EK's team of consultants and engineers expertly applied Agile to quickly adapt to unforeseen changes and roadblocks in development. As a result, rather than talking about the Knowledge Portal, we were able to *show* early prototypes, spawning a wealth of end user understanding and feedback from the first months of the project.

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⟋ THE RESULTS

The Knowledge Portal consolidated the firm's vast intellectual resources in a single searchable space, arming investment professionals with easy access to valuable information and connections to experienced staff in ways that had never before been possible. EK is continuing to iterate to add additional features and sources, but the results are already being felt by the organization. Key performance indicators and milestones to date include:

- Strong adoption, with overall user counts increasing and extremely high retention of all users.
- Less time spent looking for information or recreating organizational knowledge, resulting in overall higher productivity and employee satisfaction.
- Faster upskilling of new hires and junior staff, with more junior staffers reporting an ability to complete tasks without waiting for guidance from others.
- Less redundant acquisitions of external research and data sets.

With additional iterations of the Knowledge Portal planned for release over the next two years, the organization continues to partner with EK and invest in the tool as a transformative solution for the organization.