



STRATEGIC ANALYSIS OF KNOWLEDGE MANAGEMENT AT EATON



WHAT IS KNOWLEDGE MANAGEMENT?

- Tacit and Explicit knowledge
 - Intangible, hard to codify (System understanding)
 - Tangible, easy to codify (reports, statistics)
- Definition
- Why should organizations care?

ABSTRACT

- Purpose
- Methods
- Results
- Solutions



WHAT ARE CRITICAL SUCCESS FACTORS OF KNOWLEDGE MANAGEMENT?

- Identification of critical knowledge
- Collection, storage, and organization of critical knowledge
- Facilitation of knowledge transfer and retention
- Utilization of existing knowledge to create new knowledge

KNOWLEDGE STORAGE, ORGANIZATION, AND COLLECTION

- Websites
 - SharePoint sites
 - Public sites
 - Intranet sites
- Microsoft Teams

SHAREPOINT

- SharePoint Server 2010

- Document storage

- Organization

- Relevant information?

- 9891 total files

- 72 files updated since 2020

- 278 files updated within a year of April 18th

- 808 files updated within two years of April 18th

The screenshot shows a SharePoint site interface for 'Warranty Sharepoint Site'. The main content area displays a 'Warranty Document Library' with a table of documents. The table has four columns: 'Type', 'Name', 'Modified', and 'Modified By'. The documents listed include folders for 'Admin', 'BPI Warranty Reduction 2018', 'Claim Quality', 'Community Service', 'Dept. Goals', 'Eaton Cummins - Joint Venture (ECJV)', 'EW-Rules Reverse Engineering', 'Literature', 'Metrics', 'Monthly Reports', 'OBIEE', 'Oracle Siebel', 'Policies and Procedures', 'Power BI', 'Prolaunch', and 'SYNTEL Review'. The 'Modified' column shows dates and times, and the 'Modified By' column lists names like 'Kominick, Stephen M.', 'Wurtsbaugh, Scott W.', 'Hoogterp, Brad', 'Hutchinson, Brian', 'Rodriguez, Antonio (HYD)', and 'Gole, Shyam'. The interface also includes a left-hand navigation pane with sections like 'Surveys', 'Documents', 'Lists', 'Discussions', 'Issue Tracking', and 'Warranty Literature'. A right-hand pane shows 'Warranty Useful Links' with various internal and external links.

Type	Name	Modified	Modified By
Folder	Admin	2/17/2014 8:40 AM	Kominick, Stephen M.
Folder	BPI Warranty Reduction 2018	9/24/2019 2:21 PM	Wurtsbaugh, Scott W.
Folder	Claim Quality	2/13/2014 1:23 PM	Hoogterp, Brad
Folder	Community Service	6/5/2012 9:17 AM	Wurtsbaugh, Scott W.
Folder	Dept. Goals	1/26/2015 1:46 PM	Hutchinson, Brian
Folder	Eaton Cummins - Joint Venture (ECJV)	4/19/2018 9:44 AM	Wurtsbaugh, Scott W.
Folder	EW-Rules Reverse Engineering	5/18/2016 11:46 AM	Rodriguez, Antonio (HYD)
Folder	Literature	11/18/2011 2:12 PM	Hutchinson, Brian
Folder	Metrics	11/18/2011 2:13 PM	Hutchinson, Brian
Folder	Monthly Reports	5/18/2016 11:38 AM	Rodriguez, Antonio (HYD)
Folder	OBIEE	2/18/2019 10:13 AM	Hutchinson, Brian
Folder	Oracle Siebel	1/24/2018 11:31 AM	Hutchinson, Brian
Folder	Policies and Procedures	9/28/2015 2:08 PM	Hoogterp, Brad
Folder	Power BI	2/18/2019 12:45 PM	Gole, Shyam
Folder	Prolaunch	11/18/2011 2:15 PM	Hutchinson, Brian
Folder	SYNTEL Review	8/23/2016 2:51 PM	Kominick, Stephen M.

ROADRANGER.COM

- Customer-focused site
 - Product and warranty process information
 - Most accessible source of information
 - Suited for customers, not employees
 - Lack of process to get information to employees

The screenshot displays the Eaton website homepage. At the top, there are navigation links for 'Login', 'Contact Us', and 'Mexico - Español', along with a search bar labeled 'ww_SearchButton'. The main navigation menu includes 'Products & Services', 'Support', 'Aftermarket', and 'Our Company'. A large banner features a blue truck and text: 'Discover the new Aggressive Performance calibration for UltraShift® PLUS and Fuller Advantage® automated manual transmissions.' Below this, there are several promotional tiles: 'Repair Guide' (Pre-authorized Warranty Repair Guidelines), 'Warranty Quick Reference' (Download), 'INTELLICONNECT' (Learn more), 'Buy direct' (Eaton lubricants now available), '2018 Eaton Transmission Guide' (Learn more), and 'Reman Bundle' (Register now). A central vertical banner reads 'COMING TOGETHER TO MOVE INTO THE FUTURE.' To the right, a 'SERVICERANGER 4' section promotes downloading the tool, with a list of links: Literature Center, Electronic Parts Catalog, Service Bulletins, Tools, Real-time Warranty, Claim Verification, and Extended Warranty. A 'Contact Your Representative' section lists 'Roadranger Academy', 'ServiceRanger', and 'Dealer Locator', and provides a call center number: 1-800-826-HELP (4357). Vertical sidebars on the left and right contain 'Bezares USA Vocational Transmissions' and 'Extended Clutch Warranties EatonPartsOnline.com' respectively.

WARRANTY INTRANET

- Inconsistent organization
- Not user friendly

The screenshot shows the Eaton's Intranet Warranty page. The header includes the Eaton logo and navigation links. The main content area features a 'Quick Links' table with three columns of links. Below the table, there is a 'Warranty Vision' section, a 'Warranty Mission Statement', and two columns of bulleted links for 'Part Return Information' and 'RWS Information FAQ's'. The left sidebar contains a navigation menu with categories like 'Functions', 'Sales & Marketing', and 'Warranty'. The right sidebar contains links for 'E-Star', 'Eaton Jobs', 'Local Pages', and 'C360 Warranty when JOE is unavailable'.

Eaton's Intranet ww_Home | JOE ww_SearchButton ww_SearchButton

Vehicle Group

EATON
Powering Business Worldwide

ww_Home > Functions > Sales & Marketing > Warranty

The Vehicle Group Locations & Plants VG Functions VG Applications

▲ Functions

▲ Sales & Marketing

▶ **Warranty**

- Contacts
- Archive Warranty Docs
- RWS Information
- Policies & Procedures
- Core Administration
- Claim Quality - RWS
- Claim Quality - C360 Warranty
- Warranty Parts Return
- Shipping & Receiving

Warranty

Quick Links		
InfoRanger Oracle 11i Serial to TA BOM Lookup Price Lists VIN Decoder (US DOT / NHTSA) Service Activity Report	IT Project BRD Template Roadranger Field Marketing RWS I.T. Responsibilities Employee Oracle Search Contact a Roadranger Rep Customer Support Center	Roadranger.com Organizational Chart Roadranger Warranty System (RWS) Access Form Warranty Literature Change - Submit in Warranty SharePoint

Warranty Vision: The Industry leader in providing comprehensive and efficient warranty support for ALL Eaton Truck Component customers involved in the warranty chain channel.

Warranty Mission Statement: To provide our customers the means to identify their warranty coverage; the tools for "pain-free" claim submission; the assurance of fair and consistent claim adjudication; the timeliness of claim reimbursement all within a time that meets or exceeds the customer's expectations.

Part Return Information

- "Packtrack" Website
- Track-Trace Website
- "Eaton Route"(Preferred carrier)
- RFM Shipping Guide (Internal)
- Service Bullitin TMIB0129 (External)

Contacts

- Dana Key Contacts
- RFM Regional Roster

Warranty Registration

RWS Information FAQ's

- RWS Updates (See SMC)
- Tech Tips
- RWS Training Instructions for RFM
- OEM Warranty Claim Process

RWS Instructions to Create:

- Field Service Report
- Group Claim
- Claim in Quick Claim Screens (QCS) with no VIN
- Service Parts Claim

E-Star
Eaton Jobs

C360 Warranty when JOE is unavailable

Local Pages

- RFM Homepage
- Call Center
- EHS Galesburg SharePoint

MICROSOFT TEAMS

- Chat, meet, call, collaborate
- Wiki functionality
 - Unable to be searched
 - Only source of captured system knowledge
 - Migrated to OneNote
 - Fails to capture full needs of Warranty department

SUMMARY

- Lacks consistent processes
 - Managing/Updating data
 - Accessibility of information
 - Capturing critical information
- Knowledge is spread out
- Improved KM Strategy
 - Updating
 - Adding
 - Organization
 - Accessibility
 - Centralization

KNOWLEDGE TRANSFER AND RETENTION



EATON UNIVERSITY



C360 SHAREPOINT



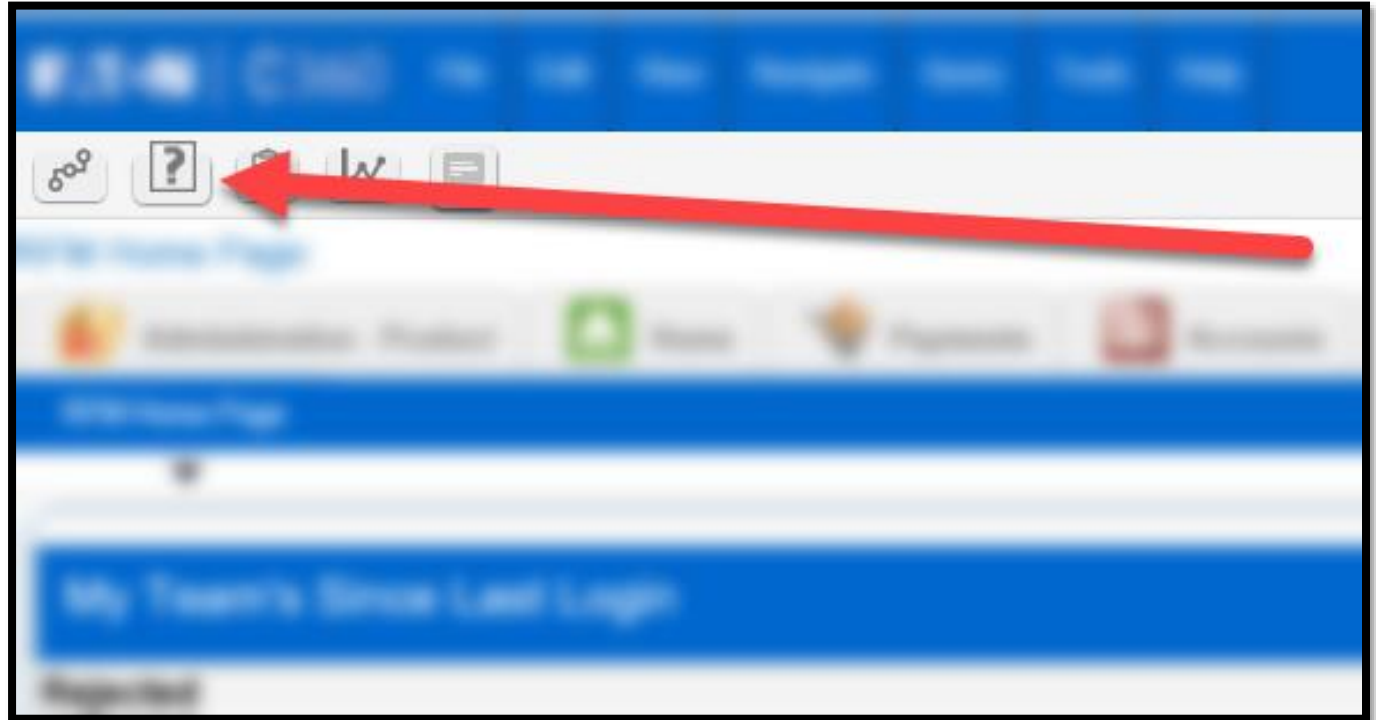
ON-THE-JOB
TRAINING



CRITICAL SUCCESS
FACTORS FOR ERP
TRAINING

C360 HELP SITE

- Claim creation
- Administrative tasks
- Instructions assume system has no issues
- Difficult to find



CRITICAL SUCCESS FACTORS OF ERP TRAINING

- 12 critical success factors
- Manager asked to provide business perspective
- Most relevant success factors
- Least relevant success factors

KEY SUCCESS FACTORS

- Users' training commitment
- Accurate, relevant, and current information
- Trainers with experience

AREAS OF IMPROVEMENT

- Personnel skills and competencies
- Contingency plans for refresher training
- Creating mechanisms of training evaluation
- Creating a continuous training program
- Training manuals both online and within the ERP system

USER INPUT AND SHORT-TERM NEEDS

- Training content focused on user's short-term needs
- Involve users in the design of training courses

SUMMARY

- Existing training documentation is limited
- Little time is dedicated to training
- Lack of training evaluation
- On-the-job training is the primary training method

SOLUTION I: TRAINING SCHEDULE

- Implemented by manufacturing side of the business
- Training evaluation
- Structure of the document
 - Training session
 - Target audience
 - Frequency
 - Schedule
 - Effectiveness measure
- Alignment with success factors

SOLUTION 2: DYNAMICS 365

- Centralized knowledge solution
- Customer Service Hub
- Integration with existing Microsoft products
- Knowledge Article module
- Additional modules
 - Case management
 - Interactive dashboards
 - SLAs

CONCLUSION

- Current platforms for knowledge management aren't enough
- Root cause of issues is lack of centralized knowledge
- Employees would benefit from more training