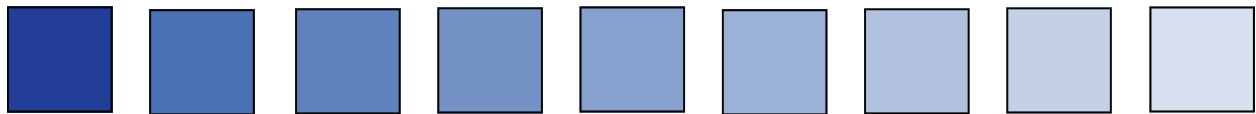


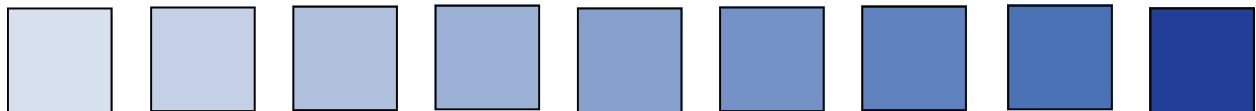
SMR INTERNATIONAL MANAGEMENT ACTION PLAN FOR KNOWLEDGE SERVICES



THE KM/KNOWLEDGE SERVICES CONTINUUM

BUILDING THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK

BY GUY ST. CLAIR AND DALE STANLEY



SMR INTERNATIONAL MANAGEMENT ACTION PLANS FOR KNOWLEDGE SERVICES

Putting KM to Work

MANAGEMENT MANUALS FOR KNOWLEDGE SERVICES: BACKGROUND – PRACTICES – PROCESS

Building the Knowledge Culture:
The Knowledge Services Effect

The KM/Knowledge Services Continuum:
Developing the Knowledge Services Strategic Framework

The Knowledge Services Audit:
Identifying and Evaluating the Organization's Intellectual Assets

Knowledge Strategy:
Planning the Enterprise-Wide Knowledge Agenda

Critical Success Factors:
Management Metrics, Return-on-Investment, and
Effectiveness Measures for Knowledge Services

Enterprise Content Management (ECM) for Knowledge Services:
A Strategic Approach to Knowledge Asset Management

Business Development for Knowledge Services:
Awareness-Raising, CRM, Marketing, and the Customer Service Plan

Strategic Learning:
Knowledge Development and Knowledge Sharing (KD/KS)

Connecting People with Knowledge:
Managing the Relationship Between Technology and Knowledge

The Partnership Workplace:
Collaboration, Cooperation, and the Knowledge Services Impact

Strategic Project Management:
Ensuring Success for KM/Knowledge Services Products and Programs

Personal Knowledge Management:
Linking Knowledge Services and the Mission-Specific Focus

The Knowledge Director:
Competencies and Skills for the Organization's Knowledge Thought Leader

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TABLE OF CONTENTS

| | |
|--|----|
| <u>Series Introduction: Knowledge Services and the Knowledge Culture</u> | 5 |
| <u>Authors' Introduction</u> | 11 |
| <u>How to Use this Management Action Plan</u> | 13 |
| <u>The KM/Knowledge Services Continuum</u> | 15 |
| <u>Defining KM</u> | 17 |
| <u>Knowledge Services</u> | 19 |
| <u>The Business Value of Knowledge</u> | 20 |
| <u>Knowledge Services in Practice: <i>Putting KM to Work</i></u> | 25 |
| <u>From the Theoretical to the Practical</u> | 25 |
| <u>World-Class Knowledge Services</u> | 30 |
| <u>The Knowledge Services Strategic Framework: Our Recommended Strategy</u> | 35 |
| <u>First Steps</u> | 36 |
| <u>Develop Your Activities</u> | 37 |
| <u>Implement, Execute, and Control Your Activities</u> | 37 |
| <u>Moving Forward</u> | 38 |
| <u>Planning the Knowledge Services Strategic Framework: Discussion Questions</u> | 39 |
| <u>Action Plan Format</u> | 43 |
| <u>Afterword: Managing Strategic Change</u> | 45 |
| <u>Inevitable and Desirable Change</u> | 45 |
| <u>A Change Management Strategy for Knowledge Services</u> | 54 |
| <u>The Organizational Knowledge Nexus: A Cautious Prediction</u> | 56 |
| <u>Bibliography and Works Consulted</u> | 59 |

SERIES INTRODUCTION: KNOWLEDGE SERVICES AND THE KNOWLEDGE CULTURE

Since the early 1900s, organizations have struggled to identify and manage practical and utilitarian information, knowledge, and strategic learning. The 20th century continuum from information management to knowledge management to knowledge services now enables the knowledge culture.

It is now clear that the knowledge continuum which began early in the last century has brought a new understanding and respect for knowledge to the management community. By the early 1900s, business leaders were beginning to recognize that change was needed with respect to information management, knowledge management, and strategic learning (although these functions were not called that yet), and they began to give attention to distinguishing “practical and utilitarian” information from that sought for personal edification, educational purposes, or entertainment. As a result, the 20th century offers many examples of how workers in the sciences, business, and research struggled to deal with the information, knowledge, and strategic learning required to support their work.

With a practical approach to the management of information, knowledge, and strategic learning within the larger organization, the company realizes the advantages of excellence in knowledge asset management, strengthened contextual decision-making, accelerated innovation, and higher-level research.

By mid-century, business management had begun to take a hard look at how information was managed. Following World War II, the management of information (particularly scientific information) had reached a crisis point, and the struggle to deal with overwhelming quantities of information was on-going. Information science—as a new discipline for dealing with the situation—became a major influence. The management of information and the move toward the much talked-about “information age” provided many strong and lasting contributions to business management, but it did not seem to be enough. More effort was required, and by the last decade of the century, when Thomas A. Stewart identified “intellectual capital” as an important business assets, the evolution of knowledge management (KM) was well under way; organizational managers began to recognize that business success could be realized when the company’s knowledge could be harvested and retrieved for business purposes. With the 21st century, knowledge services came onto the scene and was soon acknowledged as the *practical* side of knowledge management. As enterprise leaders sought to “put KM to work”—as the effort was characterized—they came to understand that with knowledge services, its value lay in its very practicality; indeed, with this practical approach to the management of information, knowledge, and strategic learning, managers came to understand that the organization has the advantages of higher-level research, strengthened contextual decision-making, and accelerated innovation.

Knowledge development and knowledge sharing (KD/KS) leads to an environment in which success at all levels is supported by a willingness to share information, knowledge, and strategic learning.

The new emphasis on the role of knowledge in the operational environment turned out to be a different way of looking at the organization’s intellectual assets, its collective knowledge. As a result, knowledge development and knowledge sharing (KD/KS) is now clearly desired in the modern, well-managed organization. Enterprise leaders recognize that the knowledge-*centric* organization is one in which success at all levels is supported by a willingness to share information, knowledge, and strategic learning developed within or for the organization. A beneficial side effect has been that transparency

(that is, openness and a lack of “hoarding” in transactions having to do with information, knowledge, and strategic learning) is now understood to be for the common good, and the old days of “information power” seem to be gone. Thus for many with management authority, KD/KS becomes a necessary ambition. If the larger goal of the organization is to achieve success (however success is defined in the specific operational environment), understanding that the data-information-knowledge-learning-sharing construct can be directly applied in the KD/KS process becomes a valuable component in enterprise success, enabling quality management with respect to the organization’s information, its knowledge assets, and the arrangement of its strategic learning programs (both formal and informal learning programs).

The Organizational Knowledge Culture. All of these knowledge-focused elements come together in knowledge services, the management and service-delivery methodology that converges information management, knowledge management, and strategic learning. With this convergence, the enterprise moves to what we recognize as a *knowledge culture*. It is a much desired state of affairs, this knowledge culture, if the comments and aspirations of many in the management community are taken at face value. It is not unusual in situations in which an organization is conducting a knowledge audit or developing a strategic plan for knowledge services for there to be reference to a knowledge culture, as in “What we need in this company is a culture that helps us use what we know,” or “How can we change the culture of the organization so our workers understand the value of sharing the knowledge they develop?”

The obvious response to questions like these is knowledge development and knowledge sharing, but as is pointed out by many leaders in the field, KD/KS does not happen automatically. In fact, some managers are reticent about KD/KS and demonstrate a certain skepticism about the idea of a knowledge culture, asserting that KD/KS cannot be directed but must evolve from a willingness on the part of all players to share the knowledge they bring to the process (or develop). Of course. The whole point of knowledge management, knowledge services, and building and sustaining the knowledge culture is to move *away* from the command-and-control management framework, and it can be safely asserted (certainly it is the belief of the present authors) that the *purpose* of knowledge services is to create an environment for a knowledge culture in which the willingness of all enterprise stakeholders to share knowledge is fundamental and a given.

It is not such a stretch, this quest for a knowledge culture. For many years organizational leaders have lamented the fact that much information, knowledge, and strategic learning is not shared, and that this lack of sharing inhibits good workplace performance. At the same time (particularly since the growth of KM and management’s interest in KM over the past two decades), the informal sharing of information, knowledge, and learning—the famous “water-cooler” or “elevator”

Enterprise leaders recognize that conversation, collaboration, and cooperation are natural elements in the knowledge-centric organization and contribute to the role of knowledge services as a critical operational function.

The attributes of the knowledge culture are described in more detail in the Epilogue to *SLA at 100: From Putting Knowledge to Work to Building the Knowledge Culture*, by Guy St. Clair (Alexandria VA: SLA, 2009).

The management perspective for the knowledge culture is detailed in the SMR International Management Action Plan *Building the Knowledge Culture: The Knowledge Services Effect*.

conversations—has led to great efforts in attempting to identify elements of these sharing activities that can be developed into management principles. Adding to the interest in knowledge services has been the development and acceptance of a management style that recognizes the value of conversation, that collaboration and interactive cooperation are all basic building blocks in the knowledge-centric organization and contribute to the successful deployment of knowledge services as a practical and utilitarian methodology supporting the development of a knowledge culture.

The knowledge culture has been defined and its attributes listed. Just as culture itself is an accumulation of shared beliefs and values within a particular population, so, too, is the knowledge culture an accumulation of shared beliefs and values—most often within an organization or other group of people—about knowledge and the application of knowledge for that organization or group’s success. Within the knowledge culture, specific attributes (identified by one of the present authors) apply. These are:

1. Strength in collaboration (with no disincentives to collaborate)
2. Respect for and support of the integrity of the knowledge process, with an emphasis on transparency (except in clearly defined situations requiring proprietary discretion or security), honesty, and trust
3. Focus on the larger organizational role and the benefits for the larger organization (not on individuals or individual departments)
4. Professional allegiance to the organization or enterprise; allegiance to an external influence, such as a profession or a school of thought or a political, religious, or social philosophy, is secondary
5. Enthusiasm for information technology and communication in the knowledge development and knowledge sharing (KD/KS) process
6. Respect for and enthusiasm for knowledge services as a management and service-delivery methodology
7. Respect for the intellectual foundation for the effort; the intellectual quest is not disdained
8. The recognition that intellectual capital is an essential and critical organizational asset and that KM—however defined—is a legitimate functional operation in the organization.

Information Professionals: Change Agents for Knowledge Services. For the information professional, the management employee with responsibility for knowledge services, there is a very specific role in the organizational knowledge culture. That manager—who in some environments is referred to as a “knowledge services manager,” “specialist librarian,” “research assets manager”—maintains beliefs and values about knowledge that build on and connect with an understanding of the organization of information, knowledge, and strategic learning and of how those disciplines converge for the benefit of the larger enterprise. Information professionals also have a clear

With respect to knowledge services, the organization's information professionals are its natural managers. They understand the relationship between knowledge and technology and make the connection between strategy and system development.

Read the full text of the 2003 SLA Competencies Statement [here](#).

The competencies are expected to be put to work in the "new" specialized library, which was discussed in detail at a private [leadership summit](#) in March, 2007.

Knowledge services is knowledge catalysis. Once knowledge has been developed, value is created through KD/KS, resulting in opportunities that produce tangible results.

understanding of the relationship between knowledge and technology. They are eminently qualified (probably better than any other group of workers in the organization) to make the connection between strategy and the planning, design, and implementation of information, knowledge, and strategic learning systems. They are thus positioned, these information professionals, for playing a leading role in delivering knowledge services, the *practical* side of KM, and for putting knowledge management to work in support of the larger organizational mission.

It is an important distinction, this knowledge services leadership role for information professionals, and one that has been identified in the competencies statements published by SLA, the international membership association for information professionals. Recognizing that they are employed in organizations that deliver "information-based solutions to a given market," these information professionals identify themselves as knowledge thought leaders for the organization. Their workplace (variously defined as a research center, a specialized library, an information center, a competitive intelligence business unit, an intranet department, a knowledge resource center, a content management unit, *etc.*) is positioned to be the organizational *knowledge nexus*, if that is what enterprise leadership wants for the organization. The management of that function (which we generally categorize as a "knowledge services business unit") falls particularly within the professional domain of these knowledge workers. They have the professional expertise, skills, and competencies to provide an overarching and holistic knowledge asset management framework for the organization, enabling the many pieces of information, knowledge, and strategic learning scattered throughout the organization to connect and work together for the common good. These same skills and competencies ensure that these information workers understand their responsibility to ensure that excellence in KD/KS is provided for the knowledge culture upon which the larger enterprise is built. They are professionally committed to take whatever path is required to achieve that excellence.

As knowledge thought leaders, these information professionals take seriously their leadership role, and in bringing knowledge integration to the larger organization, they carefully distinguish between knowledge management and knowledge services. They understand that "knowledge management" is sometimes an inappropriate descriptor, and recognize that knowledge *per se* cannot be managed, although—as is often described—KM can be characterized as *working with knowledge*, for example, or as managing the knowledge *eco-structure*, or as knowledge *searching*. For Dale Stanley, another of this Management Action Plan's authors, the most practical approach is to focus on knowledge services. Instead of attempting to define KM, Stanley advises organizational management to move to knowledge services, considered by some to be very close to or the equivalent of the KD/KS process: "Knowledge services can be considered *knowledge catalysis*," Stanley says. "That is, once knowledge has been developed,

The leadership role of the information professional with respect to knowledge services is described in: "[Knowledge services and SLA's history: nearly 100 years of putting knowledge to work: an interview with Guy St. Clair.](#)"

value is created by facilitating an interaction (knowledge sharing) among those who have knowledge and those who need to work with knowledge. It is the creation of knowledge *value* through KD/KS, finding and leveraging opportunities that produce tangible results.”

Information professionals are the natural employees for creating knowledge value for they are, if nothing else, true knowledge, information, and strategic learning catalysts.* They clearly understand the place of positive change in the workplace and they express no doubts about their role in the creation of knowledge value. Indeed, information professionals—whether known as knowledge specialists, specialist librarians, or by any of the many other job titles applied to them as knowledge workers—have long distinguished themselves in providing added value to the information, knowledge, and strategic learning delivery process.

Like Stanley, Alvin L. Jacobson and JoAnne Sparks recognize the value creation objective. They demonstrate that it is through the successful management of the “strategy-focused” knowledge services business unit that creating knowledge value is realized. Jacobson and Sparks take the position that to begin the process—whether for knowledge services or any other element of knowledge management and knowledge services—information professionals must identify and work with four essential elements in the process:

1. Determine the central value proposition and objectives of the plan
2. Conduct an opportunity assessment of existing services, projects, technologies, and skill sets against the value proposition
3. Build strategic maps that show how you plan to get from where you are today to where you want to be tomorrow
4. Design and implement a measurement system that will monitor ongoing performance to plan and enable “mid-stream” corrections.

The key element, of course, has to do with change, and the importance of embracing change for the good of the larger enterprise. As became evident during the last years of the 20th century—when information management was evolving into KM and then into knowledge services—and as knowledge services now moves into supporting the development of the knowledge culture for businesses and organizations, the ability to move fast and to generate tangible returns becomes critical to organizational success. These qualities—speed of delivery and ROI—are no less true for knowledge management and knowledge services than for any other management tool, and it is through the application of change management principles that speed of delivery and ROI are achieved.

* Recognizing this leadership role, and to encourage clarity and consistency, the authors use the term *knowledge services director* to describe the information professionals who have operational responsibility for the management and delivery of knowledge services.

Every information professional seeking to lead knowledge integration in the organization must master change management.

While the term “change management” has become something of a cliché during the past few years—perhaps from overuse but just as likely from its characterization as something few managers want to deal with—the concepts that underlie change management continue to be valid and important in organizational management. For every information professional interested in leading the organization into a knowledge integration “mode” as the organization transitions to a knowledge culture, mastering change management becomes, in and of itself, a critical management tool. As long ago as 1991, it was being asserted by David S. Ferriero and Thomas L. Wilding that organizations must be in a constant state of openness to change if they are going to maintain a high degree of relevance. Thus change aimed at maintaining corporate relevance can be seen as both desirable and inevitable, an idea that has probably contributed to the “mantra” that has come to guide information and knowledge thought leaders in the company. Indeed, recognizing the desirability and inevitability of change and developing (or employing already developed) skills for building a foundation for change, for managing resistance, for encouraging participation, and for creating methods for rewarding and recognizing enterprise stakeholders who successfully embrace KD/KS have become major factors in determining knowledge services success. They lead directly to KD/KS. They bring attention and credibility to the importance of understanding and utilizing change management (however the activity is designated in the workplace) in the development of the knowledge culture, and they should not be underestimated.

Thus as we look to the development of a knowledge services focus for the larger organization, we consider a number of underlying themes:

- the extent to which the enterprise is perceived and enabled as a knowledge culture by all its stakeholders (and in particular the organization’s managers and leaders, exemplified by their participation as sponsors in the management of an enterprise-wide knowledge services strategic framework)
- perceptions of value with respect to knowledge and the role of knowledge services in the creation of business value
- elements of organizational success at play in the larger enterprise and how these are monitored and measured
- change management and change implementation as an operational construct.

When these themes are recognized as part of the organization’s functional structure and all enterprise affiliates understand how they affect organizational success, attention to a strengthened knowledge services focus can begin and the knowledge culture—elusive until now and thought, perhaps, not to be possible—is at hand.

AUTHORS' INTRODUCTION

Knowledge management and the provision of knowledge services are now acknowledged as critical to organizational success, but that has not always been the case. Indeed, it has been only in the last two decades or so that management attention has been directed to the benefits of excellence in knowledge management, but now that enterprise leaders understand the business value of knowledge, this first decade of the new century is offering important new opportunities for dealing with organizational information, knowledge, and strategic learning (which opportunities themselves could be characterized as KD/KS). Indeed, thanks to advances in information technology and the elevation of knowledge capture to an operational function subject to scientific study and professional management, the functioning of knowledge services in the organizational workplace is no longer a desirable but remote aspiration.

What we have with knowledge services, of course, is but one element of the ever-expanding organizational attempt to “manage” knowledge, to get a handle on the information, knowledge, and strategic learning required for success in every organization, regardless of size of the organization or its subject focus or functional purpose. As with other activities associated with knowledge management, identifying strategies for success with knowledge services has moved high up the list of priorities for any person with management responsibility, whether for an entire organization or for one of its functional units. Knowledge services is now understood to be a central element in knowledge asset management, and the whole KM/knowledge services “package” is now recognized as critical to organizational success.

As with all operational functions, knowledge management and knowledge services cannot contribute to organizational success unless high performance standards are achieved, an objective clearly linked to planning (and the impetus behind this series of Management Action Plans). In the modern workplace, performance does not just “happen.” The very embodiment of performance in the workplace has to do with the planning process: determining expectations, the development of goals and objectives, and the implementation of strategies to achieve those goals and objectives. So it is with knowledge services. We must consider, we must discuss with colleagues what we are seeking to do, and we must carefully and thoughtfully give attention to what we want the knowledge services role in the organization to be. It is our expectation that the concepts and direction presented here, especially the discussion questions, will help each reader approach knowledge services with confidence.

No organization can succeed and grow until its organizational culture includes an understanding that success depends on the ability and willingness of all stakeholders to develop and share knowledge. The purpose of this Management Action Plan—and the others in the

series—is to provide information professionals and other knowledge thought leaders practical advice for achieving that success. The authors' premise is that an organizational knowledge culture is essential for the achievement of the organizational mission, whatever that mission is or however it is expressed. With this plan, the goal is to develop a strategic framework for knowledge services, to ensure that knowledge services is managed as well as it can be managed in support of the knowledge culture.

For each subject presented in these Management Action Plans, we offer background about the subject in terms of its connection with knowledge services, a description of practices associated with the subject as it applies to knowledge services, discussion questions identifying and codifying specific concepts, situations, and needs directly related to the reader's workplace, and a format for an action plan to be used to organize and frame specific activities to be undertaken by the knowledge services manager and staff. Three sections included in each of these Management Action Plans do not vary much from plan to plan, as they apply to all of the subjects described: this introduction, the series introduction—which presents the reader with general background information about knowledge services—and the afterword, our comments and thoughts about the place of change and the role of change management in the modern knowledge-centric enterprise. Whether we are comfortable with admitting it or not, this last is the basis of our success in all we do in the workplace, and it is the authors' firm belief that attention to the principles of change management and change implementation is critical to the success of any undertaking having to do with knowledge services.

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HOW TO USE THIS MANAGEMENT ACTION PLAN

1. Read the Series Introduction to determine if you are in agreement with the perspective or point of view described. The emphasis here is on the value knowledge services brings to the organization, the role of knowledge itself as an organizational asset, and the need for the development of a knowledge culture or the enhancement of an already existing knowledge culture in support of KD/KS in the larger organization
2. Thumb through the essays “The KM/Knowledge Services Continuum” and “Knowledge Services in Practice: *Putting KM to Work*” and identify sub-topics to focus on later
3. Review the Afterword (“Managing Strategic Change”) and think about how these change management concepts align with the organizational culture where you are employed
4. With your colleagues, read over the discussion questions and come up with talking points to use as you develop your plan. Record your responses to the questions and meet together to brainstorm about how these apply in your workplace
5. Follow this with an in-depth review and discussion about the elements of developing a knowledge services strategic framework
6. Return to the essays “The KM/Knowledge Services Continuum” and “Knowledge Services in Practice: *Putting KM to Work*” and read them in depth, now with a view to learning concepts for developing a strategic framework for knowledge services in your organizational context
7. Using the action plan format included in this document, commit to the basic action items for implementing your plan
8. Initiate your plan for putting KM to work through developing and using your knowledge services strategic framework.

As with any management tool or technique, there are a variety of ways to implement planning activity. Those presented here necessarily represent the experience of the authors, with emphasis in those areas given focus in their work. Other practitioners might weigh different topics or directions, but the final result, in all cases, should be a planning guide that will support the organization as it seeks to provide excellence in the management and delivery of knowledge services.

THE KM/KNOWLEDGE SERVICES CONTINUUM

Intellectual capital: “the sum of everything everybody in your company knows that gives you a competitive edge in the marketplace.”

—Thomas A. Stewart

For nearly forty years, organizations and institutions have been aware of the work performed by those “knowledge workers” identified by Peter F. Drucker. For much of that time though, while the connection between organizational success and the role of those knowledge workers was more or less recognized, little particular attention was focused on the work of these employees. That state of affairs began to change in the early 1990s when Thomas A. Stewart called attention to the organization’s intellectual capital, referring to intellectual capital as “the sum of everything everybody in your company knows that gives you a competitive edge in the marketplace.” Since then, organizational management and information professionals have made specific efforts to incorporate the concept of knowledge management (KM) into the workplace.

Historically, the push for knowledge management came after the growth of information management. Initially, knowledge management used some of the same techniques and solutions applied to information management. Soon, though, new ones—aimed specifically at KM—were also used.

Was that the beginning of KM? Probably not, for the need had been apparent for some time. After the information “glut” of the 1950s, following the enormous growth of scientific and technical information that began during World War II (and which moved quickly into the further focus on scientific and technical information during the Cold War), and following the “information wars” of the 1960s and 1970s, it was a natural next step to attempt to come to some understanding of the role of knowledge in organizational management and mission-specific success. As it turned out, a great many specialists and scholars in different parts of the world were working on the problem of how to manage these enormous amounts of information, so it was not too much of a stretch to try to apply some of these same techniques and solutions to dealing with the knowledge generated as that information was used, or to seek new techniques and solutions for applying to the knowledge development and knowledge transfer process. So for some KM historians, the interest in KM as a subject and as a discipline dates to the 1950s.

From its origins, the goal of knowledge management has been to enhance the understanding of how knowledge is used in the workplace.

Whatever the reasons for the growth of KM, people like Drucker and Stewart certainly pointed organizational leaders in the right direction, and the growth of interest in dealing with knowledge—with “managing” knowledge—made a great deal of sense. Indeed, aside from the value to the organization in the accomplishment of the organizational mission, it seemed to be generally assumed that achieving an understanding of the role of knowledge in the workplace would enable better performance. And why not? One does not attempt to organize and manage knowledge simply because knowledge is inherently good, or because acquiring knowledge makes one a better person. Achieving an understanding of knowledge in one’s life and being able to deal with knowledge come together to foster an independence of thought, for most people a state to be desired, and unquestionably a state to be desired in the workplace. So it would seem to follow that understanding the role of knowledge in the workplace would permit one to give the subject at hand a level of attention that

would enable excellence in knowledge asset management, leading to improved high-level research, strengthened contextual decision-making, and accelerated innovation.

“...the first iteration of knowledge management featured a predictable helping of hype and was embraced by large organizations ... today businesses are less voluble about the term KM while more of them practice the ideas that gave rise to it.”
—Michael Dempsey

KM in the workplace. Thus we recognize a connection between knowledge and the workplace. As managers and organizational leaders began to place value on knowledge and the role of knowledge developed within the organization (and of encouraging an organizational culture in which knowledge is shared by all employees at all levels), it made sense to think about how the organization at large might deal with this elusive and hard to capture intellectual capital. Not surprisingly, by the end of the last decade of the last century KM had become a function for considerable attention in the management of the well-run enterprise, as pointed out by Michael Dempsey. Writing two years ago in *The Financial Times*, Dempsey noted that “the first iteration of knowledge management featured a predictable helping of hype and was embraced by large organizations eager to underline their credentials by appointing a chief knowledge officer to spread the KM gospel. That approach belonged to the late 1990s and today businesses are less voluble about the term KM while more of them practice the ideas that gave rise to it.”

“Knowledge management” may not be an ideal term. Some argue that knowledge cannot be managed, but there is more than semantics involved.

Perhaps one of the reasons for that “predictable helping of hype” and our enthusiasm for the ideas that led to the rise of KM was simply that the whole idea of dealing with knowledge and attempting to manage knowledge seemed to be something of a contradiction. Could knowledge even be managed? The question has been asked often, and it is answered most often in the negative. Yet there was something very positive about the idea, and despite the difficulties (intellectually speaking) of defining what we were playing with, it somehow felt “right,” like something we should be doing in the workplace. For many information professionals, that struggle with “managing” knowledge was put into focus when one of their colleagues—and one of the acknowledged leaders in knowledge management—was interviewed about the subject. Larry Prusak had early on recognized the importance of KM for the management community, and interviewer Jeff De Cagna commented that he had heard that Prusak and Tom Davenport—with whom Prusak had done much of his work—had expressed a wish to “take back” the term “knowledge management.”

Prusak’s response was direct and to the point. Knowledge management, he said, “is really working with knowledge. You can’t manage knowledge, *per se*. It is not a thing that is manageable. You can’t manage love or honor or patriotism or piety. It is clearly working with knowledge, but the words got out there and there it is.”

DEFINING KM

Knowledge management is context specific ... no organization and its KD/KS framework is going to be like that of any other organization.

So “knowledge management” it is, and at this point in time, many of the concepts associated with KM have become almost commonplace in the management lexicon. How they are put together, though, seems to be very different in different organizations and environments. So much so that attempting to define KM becomes almost fun, and a big part of the fun is the fact that there are so many definitions and approaches to KM. Indeed, it might even be suggested that there are as many definitions of KM as there are people seeking to define KM. It is a situation that leads to a considerable amount of confusion in some circles but in most cases the confusion is often made more palatable (and interesting) as the participants in the discussion realize that what they are trying to do makes a great deal of sense. They learn very early on—as they have their discussions—that KM is context specific, and just as no specialized library or information center is like any other, so no organization and its KD/KS framework is going to be like that of any other organization. KM in any organization is going to relate to and seek to address the organization’s specific needs. In attempting to define KM in their own context-specific formulation, information professionals, knowledge thought leaders in the organization, and others discussing the subject are able to open themselves to a rewarding and often very useful intellectual endeavor.*

Whether it is considered a process or a methodology, the goal of knowledge management is to ensure the creation, capture, organization, access, and use of knowledge assets.

Approaching a definition for KM begins with recognizing that many words and phrases come up with some frequency: “creating business value,” “competitive advantage,” “a systematic process,” “leveraged decision-making,” “collaborative,” “integrated,” and so forth. Some definitions acknowledge the role of technology, as T. Tiwana did in 2000 when he described KM as “...an effective knowledge management strategy is ... a well-balanced mix of technology, cultural change, new systems, and business focus that is perfectly in step with the company’s business strategy.” Some definitions identify KM as a process, and others describe the discipline as a methodology for managing intellectual assets (especially unstructured assets) to ensure the creation, capture, organization, access, and use of those assets.

For some knowledge workers (and/or their managers), the goal is to take those unstructured assets and identify how that information can be transitioned from “information” to “knowledge,” as Bruce Dearstyne has suggested. Dearstyne, a leader in the records and information management field, defines knowledge management as “cultivating and drawing on tacit knowledge; fostering information sharing; finding new and better ways to make information available; applying knowledge for the strategic advantage of the organization.” Other definitions are directly practical. Nigel Oxbrow and Angela Abell, for example, in their presentation for one of the State-of-the-Art Institutes of the Special Library Association (SLA), took such an approach when they

* For an abbreviated history of KM and some approaches to the subject, see St. Clair, Guy. “Knowledge management” *Encyclopedia of Library and Information Science*, 2003.

When KM is talked about what most people in most organizations mean is “working with knowledge.”

put forward their definition of KM: “The ultimate corporate resource has become information—the ultimate competitive advantage is the ability to use it—the sum of the two is knowledge management.”

In attempting to define KM, it soon becomes clear that the function of managing knowledge is to ensure that “working knowledge” (as Davenport and Prusak describe it) becomes part of the workplace experience for all workers. Thus the function of working with knowledge is basically what organizations and institutions are attempting to do when KM is talked about, as we seek to put in place a framework for supporting that function. If the organization is to succeed in achieving its organizational mission, using knowledge developed within the organization and shared among organizational stakeholders becomes a critical purpose.

Problems with definitions. Still, there are problems with the many and various definitions applied to KM (no matter how much fun it is intellectually to pursue the discussion, the fun cannot alter the fact that in the workplace the discussion must focus on the anticipated KM role in the successful achievement of the organizational mission). For one thing, many of the definitions are not, by and large, particularly practical (despite Oxbrow and Abell’s early thrust in this direction). It is not unusual for knowledge workers and their managers to experience some difficulty moving from their pleasant intellectual discussions about KM to identifying exactly how the discipline can be used in their particular workplace. They want to move to KM, and they know it is the right thing to do, to get their arms around the great wealth of knowledge that is captured within the organization, but making the move does not happen easily.

Some managers feel that knowledge management is not sufficiently practical. Knowledge workers must be prepared to demonstrate the benefits of properly instituting knowledge management programs, as well as the costs of **not** doing so.

There are several reasons why this is the case. One constraint comes into play when the discussion turns to the ambiguities built into the definitions. People begin to ask questions like, “Is KM ready for our organization and culture?” or, put another way, “Are we ready for KM?” In many environments, the very term “knowledge” is a little off-putting, leading some workers (and, indeed, some in supervisory or management positions) to wonder if moving into KM is appropriate, since they have the idea that attention to “knowledge” is too “academic,” or too “intellectual,” and not “down-to-earth” enough with respect to the work of the organization. These arguments are quickly refuted when the discussion moves on to include examples about the costs of wrong information, or of knowledge not shared, or of failing to meet a compliance regulation because a particular knowledge-transfer procedure had not been developed.

Discussions about defining KM also get a little sticky when bad examples are put forward (usually, sadly, by workers with limited or pre-conceived ideas about knowledge or the advantages of knowledge development and knowledge sharing in the workplace). Typically based on poorly defined or ill-conceived KM experiences that have not been successful and are often the result of a misplaced or misapplied

technology focus to the subject at hand, these kinds of failures can sour executives and organizational sponsors, resulting in a larger reticence about KM that prevents innovation and intellectual stretching the next time a KM opportunity comes along. Even when there is interest in moving to a KM solution, many knowledge workers and information professionals soon find themselves bogged down in discussions about databases, new tools, technological barriers (or gateways) and the like. By the time they get back to thinking about their users' perspectives and the "big-picture" organizational needs that got them to thinking about KM in the first place, the idea of putting KM to work for their organization has become a monumental task.

Perhaps KM is not in and of itself a product or a thing. Perhaps KM is a management practice, an atmosphere or ambiance in support of KD/KS.

Perhaps, as KM definitions seem elusive and/or problematic, there is another way of thinking about KM and resolving the conundrum. Perhaps KM is not, in and of itself, a product or a thing. Perhaps KM is, as one of the present authors has suggested, more of a management practice: KM is used to help a company manage explicit, tacit, and cultural information in ways that enable the company to reuse the information and for creating new knowledge. More than anything else, knowledge management is an established atmosphere or environment, a ambiance if you will, in which the development and sharing of knowledge—at all levels within the company and including all levels of knowledge—is accepted as the essential element for the achievement of the corporate mission.

KNOWLEDGE SERVICES

Knowledge Services converges information management, knowledge management, and strategic learning to enable better research, contextual decision making, and accelerated innovation.

The solution, for many information professionals, is to combine KM with what is already being utilized and identified as productive, using a framework that has been refined during the last decade or so. On a daily basis, most knowledge workers deal with information management and strategic learning, both of which are important disciplines and management tools in every well-run organization. When organizational management and information professionals put them together with KM and devise procedures for converging information management, KM, and strategic learning, the organization moves into the realm of knowledge services, the management and service delivery framework that seems to be the very solution these knowledge workers (and their employing organizations) require. As a management and service delivery framework, knowledge services enables organizations to put the theoretical and not always clearly defined KM to work, moving to the practical side of KM and in doing so, enabling the research, contextual decision-making, and innovation that form the very foundation of organizational success and lead to the support of the knowledge culture.

It is a natural connection, this linking of information management, KM, and strategic learning. Indeed, they are, in effect, already connected in the minds of most information professionals and knowledge workers. It is they who understand information management because they deal with

it all the time. In doing so, they become established (or should be established) as the organization's greatest asset when it comes to organizing and managing information. These employees are strategic learning specialists, too, for information professionals and knowledge workers long ago learned that strategic learning is something else they do all the time. They understand that "strategic learning" is really nothing more than a fancy designation for any learning activity through which any employee becomes better qualified to do his or her job. It can be as sophisticated as leave time for pursuing an advanced degree in a subject that will strengthen workplace performance, or as uncomplicated as working with the colleague in the next cubicle to learn how to tweak an application to make it more relevant to one's work. Just as they understand information management, knowledge workers understand strategic learning because it has always been part of their work. In embracing knowledge services, in converging information management and strategic learning with KM (however defined), information professionals and other knowledge workers become empowered to perform at a higher level. Bringing that enhanced performance into a workplace ambiance that acknowledges and supports KD/KS, we are ready to bring the knowledge culture into the enterprise.

THE BUSINESS VALUE OF KNOWLEDGE

In the larger organization, when considering the role of knowledge services, we generally begin with the organizational goal, its mission. Every enterprise has developed (or should have developed) an organizational vision statement, a mission statement, and a statement of the organization's values. While these are implicit and not spelled out in some organizations (a situation not recommended, as it leads inevitably to confusion and, in some cases, disarray in terms of customer and staff expectations), every organization has some goal or objective that states—however loosely—why it exists.

It is in the pursuit of the organizational mission that the catalytic property of knowledge services brings enterprise-wide value, leading to actionable and measurable results.

It is in the pursuit of the organizational mission that the catalytic property of knowledge services brings enterprise-wide value. As noted earlier, a basic tenet of knowledge services is that knowledge value is created when those who have knowledge and those who need to work with knowledge are able to share what they know, finding opportunities that produce tangible results. Thus knowledge services—as a management and service delivery methodology—is positioned to contribute to the organizational mission.

Making the connection between knowledge services and mission-critical success is not hard to describe (even though it is—depending on local circumstances—often hard to achieve). Obviously the goal is attainable, or it would not have been chosen in the first place. It can even be achieved with excellence and high standards of quality service delivery if all stakeholders understand that—as Peter Drucker has famously put it—they give attention to three basic management

elements. Managers and their direct reports especially must “focus on the mission, define the results we are after, and assess what we’re doing and how we do it.” As described in other plans in this series, the organization’s management team and all participants in the effort must begin at the beginning, identifying and analyzing the parent organization’s vision, mission, and values statements.

Vision, mission, and values for the knowledge services business unit must match and support those of the organization as a whole.

A closely related next step is to identify, analyze, and compare the vision, mission, and values statements of the functional unit which has knowledge services management responsibility with the vision, mission, and values statements of the larger enterprise. These two actions, more than anything else, will ensure that all players in the process are aligned in their understanding of their larger goal and ensure that in the many discussions to follow, this goal will be the beacon that guides them in their work.

Of necessity, then, we speak much in the management community about the organization’s vision, mission, and its values with respect to the workplace and its offerings to its market, and we do so also when thinking about the role of knowledge services in the larger enterprise. It is helpful to consider fundamental, agreed-upon definitions, and for our purposes we turn to Allison and Kaye.

Vision:
What success will look like
[can be flexible—vision
sometimes changes]

Mission:
What we do
[can change but not often]

Values:
How we behave along the
way
[do not change]

Although writing for the non-profit sector, these specialists provide definitions that work in any organization. They describe the vision statement as “an image in words of what success will look like,” the mission statement as communicating “the essence of the organization, why it exists,” and the values statement as a description of “principles or beliefs which guide stakeholders as they pursue the organization’s purpose.” These easy-to-articulate descriptions enable those with knowledge services responsibility in any environment to have—and to be able to articulate to others in the organization—a good idea of where the focus on knowledge services can begin.

Deeper drilling is called for, though. Having an idea of what the enterprise (and the knowledge services business unit’s) vision, mission, and values are—as stated publicly—is one thing, but coming to grips with how they are incorporated into the organization’s operations can be a challenge. Peter Senge captured the basics of this problem ten years ago: “Peter Drucker has elegantly presented the three ingredients of the discipline of innovation: focus on mission, define significant results, and do rigorous assessment. But if it sounds so simple, why is it so difficult for institutions to innovate?” For Senge, the search begins with the mission: “It is very hard to focus on what you cannot define and my experience is that there can be some very fuzzy thinking about mission, vision, and values,” Senge wrote. “Most organizations today have mission statements, purpose statements, official visions, and little cards with the organization’s values. But precious few of us can say our organization’s mission statement has transformed the enterprise. And there has grown an understandable cynicism about lofty ideals that don’t match the realities of organization life.” To move beyond the

cynicism, Senge suggests in an article published in 1998, requires that managers recognize that the essence of leadership (“what we do with 98% of our time”) is communication: “To master any management practice, we must start by bringing discipline to the domain in which we spend most of our time, the domain of words.”

The knowledge or information professional is uniquely positioned to link the organization’s knowledge services requirements with the larger enterprise focus, and to show how knowledge services yields results.

For the information professional with leadership and/or management responsibility for knowledge services, the solution in this case is to begin by looking at how knowledge is valued in the larger enterprise. This process starts with an unromantic and very businesslike look at two sets of vision, mission, and values statements, those of the larger organization and those of the knowledge services business unit (and those of parallel knowledge-focused business units, if their participation in establishing the business value of knowledge has been established or is being considered). These statements provide the information professional with a starting point, one that can be used, as noted above, to determine goals that the organization can be expected to meet as it pursues its specific purpose. It is in this activity that the particular strengths of the information professional come into play, for no one else in the organization has this knowledge worker’s particular ability for linking the organization’s knowledge services requirements with the larger enterprise focus. In understanding the value of an organizational knowledge culture, this employee is well qualified to articulate how the implementation of KD/KS through knowledge services can yield results that will benefit the entire organization.

An organizational knowledge culture:

- Supports and rewards high levels of knowledge sharing
- Seeks to strengthen ties between technology and knowledge

We now understand that the organizational goal is to achieve success, however success is defined for the larger organization. To achieve that success requires the consideration of several specific elements in the organization’s operational structure. First of all, as discussed earlier in the Series Introduction, an enterprise-wide knowledge culture establishes a theoretical and intellectual atmosphere for successful interactions with respect to information, knowledge, and strategic learning. In every organization, all transactions and intercourse among the various stakeholders require the sharing of information, knowledge, and strategic learning. When KD/KS is carried out in a culture that recognizes and supports the highest levels of knowledge sharing, all parties reap the rewards. As an organizational and operational philosophy or ethos, the knowledge culture stands as a functional environment in which all parties seek to strengthen the relationship between technology and knowledge, with particular emphasis on strengthening the connection between technology and knowledge as developed and shared in the workplace.

To move the organization to a knowledge culture requires a focus on information management, knowledge management, and strategic learning, this last simply being another way of describing anything that anyone learns that helps the person do his or job better, more effectively, and more efficiently. These three disciplines—information management, knowledge management, and strategic learning—

Knowledge services enables excellence in knowledge asset management, which in turn improves research, enhances decision-making, and accelerates innovation.

converge in and constitute the fundamental elements of that branch of organizational management we refer to as “knowledge services.” The purpose of knowledge services, both as a function and as an organizational framework or ambiance, is to enable excellence in knowledge asset management, leading to improved high-level research (wherever in the organization research is required, even for employees who do not think of themselves as conducting research), strengthened decision making, and accelerated innovation throughout the organization. While the organization can function—and perhaps function quite successfully—without this convergence, the results of quality service delivery with respect to information management, knowledge management, and strategic learning are considerably enhanced when they are incorporated into a single management and service delivery methodology.

Every organization can benefit from the existence of a knowledge nexus, where responsibility for knowledge management and knowledge services is centered. The wise knowledge or information professional seeks to be an integral part of that knowledge nexus.

Those results are evident in organizations where knowledge services is taken seriously, for they lead to the optimal creation, use, and sharing of information, knowledge, and strategic learning throughout the larger organization. These are organizations that give priority to demonstrating the critical and strategic role of high-quality knowledge services management for all organizational leadership, staff, and stakeholders. There is generally a central connection point or knowledge nexus for the organization, with operational responsibility for the management of knowledge services delegated to this functional unit, ideally on a whole-of-enterprise basis. Finally, in these knowledge-centric organizations, service development for knowledge services is shared by and responds to the requirements of the organization’s employees, with particular attention to the development and implementation of mission-specific and inclusive enterprise content management (ECM) and the development of an employee-focused organization in which staff skills and competencies reflect the commitment to support the organization through strengthened relationships among all enterprise stakeholders.

KNOWLEDGE SERVICES IN PRACTICE: PUTTING KM TO WORK

With this background, we begin our transition from considering the fundamentals of knowledge services as a management and services delivery methodology to identifying how we can use knowledge services in our work, how we can move from the theoretical to the practical and build a strategic framework for knowledge services that supports and enables the organizational knowledge culture. In the process, we move through two useful steps, with each providing examples from the world of knowledge services that can illustrate ideas, concepts, and practices that can be considered in creating or enhancing the management of knowledge services in our own organization. In the first, we think about some of the reasons why we must think about knowledge services in “real-world” terms. In the second, we look at the highest management standards for knowledge services, standards that have evolved into what we like to think of as “world-class” levels of management and service delivery for this important enterprise function.

FROM THE THEORETICAL TO THE PRACTICAL

Theory provides the model and the standards but in knowledge services the concepts must be put to work for the good of the organization.

In any discipline, theory is useful for providing the model, the standard, or the ideal for performance. While theory—generally agreed to be a body of rules, ideas, principles, and techniques that applies to the discipline—might capture the essence of the discipline and the goals of its practitioners, theory alone cannot take us to the desired effects we seek, particularly in the workplace. For many, since we think of “theory” in terms of how theory is distinct from actual practice, theoretical musings on a subject can be nothing more than setting the stage, providing an intellectual or conceptual snapshot of where we want to go or what we want to accomplish. It cannot work by itself or in a theoretical “vacuum,” as we all know from experience as one or another of our good ideas crashes when taken “to the floor,” as industrial managers describe the experience. We learn the hard way that we must test our theories before they become actionable.

Moving these thoughts into the knowledge-centric workplace, we also know—from experience and from many years of management science as a discipline—that workers cannot (or perhaps are not inclined to) apply tools, techniques, or concepts unless they are directly applicable to work, so we must acknowledge that moving to a knowledge services framework will be a futile exercise unless the people affiliated with the larger enterprise, its employees and other stakeholders, can quickly recognize what the advantages to them will be if they begin to think about KD/KS in their work.

Connected to this is a similar consideration. The move to the practical obviously requires a commitment to KD/KS, but knowledge workers must be incentivized to develop and utilize a KD/KS framework, a

formidable challenge in any circumstance but when dealing with how people manage information, knowledge, and the strategic learning activities in their business lives, a particularly formidable challenge indeed.

An initial project with good prospects for quick success helps to encourage organizational stakeholders to “get on board” with knowledge management, KD/KS, and knowledge services. Nothing succeeds like success.

To meet such challenges, we must look to the value proposition for knowledge services, to build a business case for incorporating KD/KS into the working lives of employees in the organization. As noted in the Series Introduction, establishing the business value of knowledge requires giving attention to a number of special activities, such as identifying strategic opportunities for demonstrating how KD/KS makes a difference in performance or impacts the bottom-line of an activity or undertaking. Similarly, focusing on projects with limited or short-term payoff gets the KD/KS success story before organizational stakeholders quickly, and provides them with the opportunity to think about how that same sort of effort or activity might impact some task or assignment in their business unit. Particularly important in meeting these challenges is the development of meaningful measures of progress and demonstrated results; nothing makes a greater impression than the relevance of a solution, and if any KD/KS activity or product can be branded as “relevant” and its operational impact clearly and succinctly stated, there is no question but that the same activity or product will be looked at in other functional units to determine if it can provide equal success there.

The “embedded” or “insourced” knowledge or information professional:

- is a member of the team
- works with team members at all levels
- ensures that information is shared
- uses best practices for managing information
- aids in the transition of information to knowledge

How do these fortuitous circumstances come about? How are such desired effects realized in other functional units throughout the organization? Particularly important in this context, what role does the information professional and knowledge thought leader play in establishing the knowledge culture, and what are the specifics of using knowledge services as the methodology for doing so? As we move from the theoretical of KM to the practical of knowledge services, a first example might look at the much-described embedded information specialist approach, a KD/KS technique which in the early days of knowledge services was called “insourcing.” First identified as a specific technique in the pharmaceutical and mass entertainment (read “theme parks”) industries, insourcing happens when a specific product development team or other working group brings a member of the information or knowledge services staff onto the team. The embedded information professional is identified as and performs as a regular member of the team, working as the team’s information/knowledge/strategic learning specialist. He or she works with all team members and at all levels to ensure that they are using the best applications for managing the information they need to utilize, that they understand how to share that information, and—as strategic learning comes into the picture—not only sharing the information but working with fellow team members as the information transitions into practical, useful, and tangible knowledge for the success of the team in completing its work.

Another example takes us to the other end of the knowledge services spectrum, to a large multi-national organization that has, through a

The enhancement of institutional success necessitates the careful management of both structured and unstructured knowledge. Together these form an essential organizational asset.

variety of iterations, evolved from the rather unsophisticated but well-meaning (and well-funded) organization it was sixty years ago, when it was created to support research in its field. As it happens, much of the organization's present work continues to require many of the same approaches that were required throughout the organization's history. For this organization, it has been clearly established that without a combined structure for managing information and knowledge related to prior projects (without, for example, a single entry point for similar projects completed over the years), and without a commitment to strategic learning to ensure that prior knowledge is available, the organization is facing an unwieldy and awkward future. Whether that prior knowledge is structured knowledge (*i.e.*, captured in published documents, project reports, organizational archives, and the like) or unstructured knowledge (*i.e.*, informal documents, digitized files, correspondence, the memories of people who worked on the projects, and so forth), it is an important organizational asset and it needs to be available for the future. In this situation, the convergence of the three elements of knowledge services—working together as an over-arching management methodology and service delivery framework enterprise-wide—positions the organization for providing a single methodology that will, in fact, enable the company to avoid that difficult future and continue its work with its markets.

Customers are well served when expertise in information gathering is combined with expertise in knowledge delivery and knowledge sharing.

In a third example, we have a very different organization, a medium-sized specialty chemical firm that has taken advantage of a structural reorganization to create an operational function that combines the corporate library, a knowledge sharing group, a strategic learning group, and a function devoted to internal communications. While still new, this combined function is finding opportunities for integrated approaches, with “integrated” in this case having two distinct aspects. First, the combined efforts of the library's expertise with external information and its very good customer approach were linked with the organization's knowledge-sharing technology expertise. Then, in a second integration, that combined activity was further matched up with knowledge delivery expertise in the learning and graphics production groups. Together, this integration activity results in a comprehensive and high quality application for the customer. Additionally, there are even more benefits, for in this case the integration approach was structured to connect this knowledge-sharing expertise with the business processes of the client group, resulting in the design of a knowledge-sharing system for process development that involved recommendations for changes in the actual workflow of individuals. Thanks to the commitment and enthusiasm of senior management sponsorship, the changes were actually undertaken and not simply talked about, with the inherent synergies of the combination of functions—integrated together in a package that provides high-value realization and quality—ensuring adoption with the customer. In all three examples, we see the value of an enterprise-wide approach to a knowledge culture. When the role of knowledge as an organizational asset is recognized and exploited and the successful implementation of a knowledge services solution leads to the success

enterprise management is seeking, we are in that desired state Kenneth J. Hatten and Stephen R. Rosenthal refer to with their version of the knowledge culture (which they describe with a slight semantic twist as the “knowing culture”). Hatten and Rosenthal urge individual knowledge workers—among whom we include information professionals, particularly those with knowledge services management responsibility—to “prepare for change by increasing our awareness of what we do or do not know.” In doing so, knowledge workers and information professionals learn to deal with the two types of knowledge that enable that preparation: “the knowledge you need to boost your performance when you know your organizational objectives [and] the knowledge that will help you define new objectives and the strategies to pursue them.”

As these examples demonstrate, in the embedding of knowledge workers into specific projects, in the development of single points of entry for enterprise-wide access, and in the integration of information, knowledge, and strategic learning delivery for higher-value service delivery, it was recognized in each parent organization that in the larger scheme of things, there was a need to “do something” about knowledge transfer, that KD/KS as an operational function was not performing at its best. As various discussions among the several stakeholders were initiated, and with everyone understanding that the solution would of necessity be context-specific, the intellectual explorations began to unfold. In most cases, the discussions would have suggested a number of practical, “real-world” ideas, goals, objectives, solutions (even, perhaps, a few desiderata—“wouldn’t it be nice if we could...?”). As these were winnowed down, and as resource allocation, staff time, and other enablers and/or barriers were identified, it would have become clear that there were solutions that could be pursued, solutions which would involve attention to how information, knowledge, and strategic learning are converged and how, in that convergence, practical and workable solutions could be sought.

What happens, of course, is that when there is concern that the KD/KS process is not functioning at its best, organizational thought leaders (often the company’s specialist librarians or other senior information professionals) talk about the problems and look for opportunities to resolve the “issues” related to knowledge services management. They then recognize that there is a list of subjects that must be addressed, and as they pursue the knowledge services idea or solution, they identify specific management tools and techniques that work in other management environments and can be expected to work in the knowledge-centric enterprise as well:

- The *knowledge services audit* is a systematic examination of an organization’s knowledge resources. Often referred to as a catalog or inventory of a company’s intellectual infrastructure, the knowledge services audit—as an *audit*—actually goes beyond identifying knowledge assets to evaluating those assets and how they are used in support of the organizational mission.

The Knowledge Services Toolkit

- Knowledge services audit
- Strategic planning
- Strategic learning
- Awareness-raising
- Return-on investment
- The technology/knowledge connection
- The collaborative workplace
- Strategic project management
- PKM
- Knowledge services management competencies

- *Strategic planning* has been variously defined, and in the knowledge services environment refers most often to developing vision, mission, and values statements for aligning knowledge services with organizational priorities. With strategic planning, we identify critical steps—including change management and change implementation—for launching or enhancing service delivery for the benefit of the larger organization.
- *Strategic learning* as an element of the knowledge services discipline is usually thought of as the critical foundation for KD/KS, since the way people interact with one another and understand their work environment as a learning/teaching organization affect how knowledge is used in support of the organizational mission.
- *Awareness-raising, CRM, customer service, and marketing* provide the necessary entrepreneurial perspective for the successful management of knowledge services and ensure that all affiliated persons know about and understand the KD/KS purpose and the business value of knowledge in their work.
- *Return-on-investment (ROI), metrics, and measurement* constitute one of the most valuable elements of the knowledge services construct, with relevance and effectiveness measures providing a direct correlation with the parent organization's other constituent functions and determining enterprise-wide success.
- The *relationship between technology and knowledge* and establishing how technology is used to connect people with knowledge have become critical components in determining the success of knowledge services management in the larger organization. KD/KS and its connection with workplace success is seriously impacted by how well knowledge services addresses increasingly digital and electronic information formats.
- The evolution of *the collaborative workplace* affects organizational management in many ways, and the role of KD/KS, resource sharing, and the management of knowledge services continues to provide enterprise leadership with useful and measurable success opportunities for meeting organizational mission-critical goals.
- *Strategic project management* is no longer thought of as something “extra” or to be looked at “when needed.” In today's knowledge-centric workplace, project management and a commitment to understanding and relating to new structures and frameworks requires those with management responsibility for knowledge services to take on important enterprise-wide leadership roles.
- *Personal knowledge management (PKM)* continues to bring forward demands from organizational colleagues for guidance in learning about (and utilizing) new products and services. In the knowledge services environment, the ever-growing presence of social networking and other Web 2.0 tools offers challenging opportunities for service delivery.

- *Competencies, skills, and qualifications for knowledge leaders* in the organizations (and specifically for managing knowledge services for the larger enterprise) all require greater and continuous attention to strategic learning, to ensure that classic management and executive skills keep in step with the demands of the knowledge-centric workplace.

All of these constituent elements come together in support of the knowledge culture. By understanding and alluding to their role in the development of the strategic framework for knowledge services, the organization's leaders are able to ensure that the knowledge services function they seek to establish will meet the KD/KS requirements of the larger enterprise.

WORLD-CLASS KNOWLEDGE SERVICES

The findings of the original study described here are published in a two-part report: [Part One](#) focuses on management issues and [Part Two](#) focuses on customer services issues.

A general and broad-based picture of knowledge services as practiced in a variety of organizations has been published and is supplemented by further study and observation. Examining knowledge services delivery in different types of settings and with a number of projects, emerging trends in the management of the modern, world-class knowledge services function can be identified. These are based on interviews and research conducted in connection with consultancy projects for strategic planning, management reviews, information and knowledge management audits, learning audits, content management/collection development studies, information sharing and analysis projects, physical access and space-planning studies, and similar activities, and this group of attributes has been characterized as the fundamental qualities for “world-class” knowledge services management.

In the study, an assortment of knowledge services business units were examined, operations in commercial research and development organizations, public scientific institutions (including those in the academic R&D environment), journalism and editorial offices, international financial organizations, scientific and research organizations in the defense community, professional associations and trade groups, philanthropic organizations, and organizations (“think tanks”) that exist to conduct research and provide reports and documents to influence or, in some cases, aid in the implementation of policies developed for the larger societal common good. The list is impressive, and when connected with examples from some of these organizations provide guidelines for the development of a strategic knowledge services framework for the organization:

- The world-class knowledge services business unit is understood within its organization to be *managed from a holistic perspective*, and its work is integrated into the larger business purpose of the parent organization. *Example:* In a large research and publishing organization located in Cambridge, MA the former specialized library has transitioned to a central knowledge nexus or focus,

World-Class Knowledge Services

- Enterprise-wide service sphere
- Cross-functional collaboration
- Knowledge nexus or hub
- Higher-value service ethos
- Added value
- Awareness raising/CRM
- Strategic learning
- Service delivery opportunities
- Advocates, champions, sponsors

serving as an enterprise-wide knowledge services business unit. The products and services offered include identifying knowledge needed in the organization, building project teams to work with other divisions, constructing databases and corporate intranet resources, and developing other tools that enable the library (now the “Knowledge Center”) to publish directories, guides to research resource collections, and similar products for the company’s entire workforce.

- *Cross-functional collaboration* (with no disincentives for collaboration) is a critical feature of the knowledge services unit’s operation. *Example:* In a research and development organization in Pretoria, South Africa the staff of the IT department has teamed up with members of the research asset management unit to work together on a project to enable staff to access all organizational content—structured and unstructured—through a common, single-access entry point. From the users’ perspectives, the location of the content is irrelevant, but the research asset management staff, most of whom are research librarians, understand the content and how it is used in this research particular environment. In working with IT, the expertise of both units is put to work in a collaborative exercise that benefits all staff.
- The knowledge services unit is recognized as *the central information/knowledge connection for the organization*. *Example:* In Northern Virginia, in one of the Washington suburbs, a large GSE—government sponsored enterprise—was created by the U.S. Congress to work with the home financing industry. With the whole-hearted support of senior management, the knowledge services staff has built a knowledge services “hub” for the company. The company is a large organization with a multi-faceted operational framework, and having established one functional unit as the preferred (and first-thought-of) source for information, knowledge, and strategic learning enables everyone in the company to reap the benefits.
- The service ethos in the knowledge services unit builds on *higher value services*. Queries brought to the knowledge services staff demand highly intensive approaches to research. There are few “simple” queries, as users generally find this type of information for themselves. *Example:* At an energy utility in California, the research management staff uses a knowledge services template to provide clients with information about a wide range of documents, complete with full-text search capability, providing links for customers so they can get to websites, documents residing in other Websites (at the Department of Energy, for example), internal reports, project profiles, energy benchmarks, and the like. An important capability—recognized by the librarian and incorporated into the catalog database—is a group of fields for linking to specific experts or past employees or consultants who have worked on or otherwise been part of a project. This capability gives the knowledge customer the opportunity to interact with someone who

has had past experience in the subject of the research, but it is designed to be used carefully. The template has a built-in “privacy-factor,” as it might be called, and does not permit the searcher to contact the other person directly. It merely identifies the person and describes his or her connection with the subject being researched, but requires a “pass-along” from one of the research management staff.

- *Adding value* to information services, products, and consultations is standard practice in the knowledge services unit. *Example:* In a large membership organization devoted to a special-interest activities group, located in the American Mid-West, the organization sought to strengthen its archives by asking its older members to contribute their memories to the organization’s historical record, for incorporation into the organization’s recognized archives on the specific subject. The knowledge services staff developed a member participation survey which was distributed to all members through the organization’s Website, its magazines and other publications, and through the membership mailing system. Members were invited to key their thoughts into a user-friendly database, in order to provide their own content and deliver first-hand information for the organizational archives. The organization is thus enabled to serve as the “archives of record” for the specific subject. The project could have been facilitated through various other departments and units of the organization, but with the knowledge services staff skills and competencies in working with reference queries, varying user expertise levels, and similar background experiences, the knowledge services unit not only enabled the activity to go forward but strengthened its own visibility and value with the larger organization.
- *Awareness building* within the constituent user base is a given, as is marketing. There is no assumption that everyone who can use the organization’s knowledge assets knows about them or knows and understands all the services that are available through the knowledge services business unit. *Example:* At one of the world’s foremost cancer research centers, the research library has developed a tool which provides clients with a listing of internally produced publications, which clients can then browse, print, export, or connect to the full text. Having identified the different elements customers need to see, which includes not only external information but documentation about research conducted in the cancer center, the tool is an example of how KD/KS enables connections. As such, it is fundamental to knowledge services delivery, linking together what the customers themselves have created, and in doing so enabling the research library staff to meet its goal of functioning literally as the connecting point for the entire organization.
- *Customer needs are tracked* on an on-going basis, as is their satisfaction with service delivery. Customer service and CRM (client relationship management) are key elements of the management picture in the knowledge services business unit.

Example: In the Pacific Northwest, knowledge services is provided in an engineering firm through the facilities of the firm's Knowledge Resources Division. The division incorporates the firm's IT function, the technical library, records and archives management, and a presentations and visual resources department. During the past five years, the division has sought to keep track of customer needs, and a recent activity was to devise a member satisfaction and survey for distribution to all identified knowledge services customers. The survey was designed to provide quantifiable data about how customers use the information, knowledge, and strategic learning content obtained through the Knowledge Resources Division. A key element of the survey was to determine cost effectiveness for knowledge services customers (from their own perspective) and to identify customers' preferences in types and formats of service delivery. To this end, the working group responsible for the project included several members of the customer group, to ensure that the customer perspective was included in the study. With the survey results, the knowledge services management team has been able to re-direct certain activities to other operational functions and to eliminate other activities altogether, thus freeing up resources for the provision of new services required by knowledge services customers.

- *Strategic learning* is recognized as a critical organizational function, and continuous efforts are made to review training and learning needs and to provide opportunities for organizational employees to gain new skills and competencies to help them with their work. *Example:* At an international financial services company in Houston, TX the manager of the knowledge services unit identified a need to orient new hires, particularly in terms of their understanding and their potential utilization of the company's knowledge services products and tools. At the same time, there were indications that usage of the company's enterprise-wide knowledge bank was decreasing, and an abbreviated knowledge services audit determined that employees other than new hires needed additional learning opportunities. Working with the company's internal training unit located in HR, the manager of the knowledge services operation was able to not only structure a strategic learning framework for the specific goal (basic training for new hires and enhanced learning for regular staff), but the level of strategic learning overall was enhanced and the knowledge services business unit was eventually given full responsibility for all strategic training and learning for the company.
- *New paradigms of service delivery* (including the development of specific products and services by internal staff, or purchased from external vendors) *are recognized as opportunities* for enhancing knowledge services for the parent organization with which the knowledge services unit is affiliated. *Example:* In a large company in upstate New York, the manager of the knowledge services unit works with clients as they advise retailers and manufacturers about

quality assurance in their products, to assist them in meeting regulatory, quality, and performance requirements, and help them to assess manufacturing facilities to ensure social compliance, review processes, and audit capabilities. With this wide range of products and services, the company takes knowledge services seriously and to meet the demand, the knowledge services unit created a suite of tools that specifically support KD/KS. The first project was an enterprise-wide search engine. After that, the unit developed a yellow pages-type solution so people can connect with other people, and this is linked to a collection of CVs because much of the company's work has to do with identifying inspectors, experts, and technical contractors, both from within the company and externally. Together, these products create a form of an experts' database that brings important benefits to everyone in the company.

- *Advocates and users recognize the value of the knowledge services unit and make efforts to see that it is supported and that sponsors are recruited to demonstrate their commitment to the role of knowledge services in achieving the organizational mission.*
Example: At a multinational technology services company with headquarters in North Carolina, the director with management responsibility for knowledge services became aware of continuing interest by some of the top executives in the organization, noting that several of them were sending staff to conduct research which was then utilized in executive level reports, public statements, and similar non-scientific products. Contacting all of the senior management staff via an internal e-mail message, the director invited them to “apply” to sponsor the knowledge services unit and in the application to demonstrate how they would express, model, and reinforce their (and their staff's) use of corporate knowledge services. To everyone's surprise, all of the executives “applied” and the company now has an annual rotation of corporate sponsor for knowledge services who has, among other responsibilities, the obligation to demonstrate to others in the company how knowledge services impacts the work of his or her office.

THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK: OUR RECOMMENDED STRATEGY

The Successful Knowledge Services Transformation Effort Requires

- Leadership
- Knowledge Services
Vision, Mission, and
Values Statements
- Knowledge Asset
Management
Responsibility and
Service Delivery
- Sponsorship, Marketing,
Awareness-raising,
and Advocacy
- Change Management
and Change
Implementation

As the organization moves to develop a knowledge culture for facilitating enterprise-wide KD/KS, fundamental questions must be asked of organizational thought leaders, including management at all levels and information professionals with (or who would be designated to have) management responsibility for knowledge services. First and foremost, enterprise leadership must establish (or agree to look into, if the issue has not been raised at the senior management level) the value of the transformation effort. Whether the objective is to transition an existing functional unit with knowledge services responsibility (such as a specialized library, research department, information center, etc.) into a knowledge asset management business unit with enterprise-wide responsibility or to create a wholly new business unit to manage and deliver knowledge services, the following questions must be addressed:

1. Is there an organizational (read: enterprise leadership) *desire* for a knowledge culture? What is the level of support and enthusiasm for such an activity, especially at the senior management level?
2. In the larger organization, what is the philosophical approach to service delivery? Regardless of the type of service, how is service delivery managed in various departments and functional units (especially units not necessarily connected with “research” or “knowledge”)?
3. Is there a leadership team (ideally made up of knowledge thought leaders in the larger enterprise, regardless of their department or functional affiliation) for undertaking a major change in the management of knowledge services throughout the organization?
4. Will it be possible to build an enterprise-wide knowledge services strategic framework in order to incorporate KD/KS into the larger organizational culture?
5. As information management, knowledge management, and strategic learning take on the defining characteristics of the 21st century, is there a willingness in the larger organization to move to an integrated digital environment in which collaboration and KD/KS are the norm?
6. Finally, can enterprise leadership commit to the support of a knowledge-centric opportunity-focused and results-focused structure?

The effort begins with a review of the current organizational picture and the management of knowledge services in the larger enterprise. Usually informal and built on conversation and anecdotal descriptions, the review captures ideas about how knowledge is thought about in the organization and, particularly, how the broader subject of knowledge and knowledge services is perceived as affecting enterprise success. The result is an organizational snapshot of knowledge services in this particular enterprise, with its particular environment and larger organizational culture.

FIRST STEPS

1. Build a leadership team. Even early discussions will require the support and enthusiasm of people who are well-versed and understand the role of knowledge in the larger organizational environment. Identify and seek participation from knowledge thought leaders who are comfortable with organization development, strategic planning, strategic partnership development, strategic learning, and KD/KS.
2. Learn about and confirm the culture and values of the organization. Nothing kills a project more effectively than one that is misaligned with the user community's culture and values. Learning and discussing this topic and then incorporating the language and concepts learned in the early proposal stages of the project will ensure alignment and the best possible user uptake and value.
3. Related to the above, give some attention to developing a “conversational” knowledge culture in the larger organization through identifying and engaging knowledge thought leaders who can be effective advocates and champions and, if at the senior level, are willing to sign on as knowledge services sponsors. Bring organizational politics into the process and use political skills to achieve your objectives.
4. Learn about your environment and engage your potential user base. Obviously your team is starting with considerable anecdotal information and probably more than enough information based on the team members' own observations. Talk about what you know.
5. Move on to more formal studies. A knowledge audit, surveys, interviews with executives, and the use of benchmarking studies are tools that will be used, probably with other tools as well, at this stage. Make use of MBWA (Management-by-Walking-Around), listening to people who are interested in knowledge services.
6. Challenge your mission. The opportunity to implement knowledge services will likely cause you—as an information professional—to stretch or propose stretching the very mission or purpose of your role or function in the larger enterprise. This is an essential exercise because it forces you to think of the largest possible impact of your initiatives. Be prepared to recognize that this enterprise mindset can be at once energizing and threatening, and keep in mind that relying on solid values, good research, and strong sponsorship will help ensure success.
7. Create an enterprise vision for knowledge services. Incorporate your knowledge of the culture, the enterprise needs, and the changing mission and values of the enterprise to create a compelling and clear future vision for the larger organization—and your role and that of all parallel information-, knowledge-, or strategic learning-focused business units in the organization. This step will be an critical foundation to creating relevant and innovative enterprise goals.

DEVELOP YOUR ACTIVITIES

8. Put together a knowledge services strategic framework planning team or working group. Identify people in your leadership team (see Item # 1, above) who have either expressed interest in the subject or who can be pressed into service because of their particular skills and expertise. Recognize that this activity is going to require time, commitment, and much hard work, and it is the type of exercise that will often (indeed, can be expected to) require a level of commitment beyond the usual tasks associated with people's work. There are people who are willing to go "the extra mile." For this process, the planning team members must understand that they will be required to do so.
9. Set specific goals. The SMART (Specific-Measurable-Achievable-Relevant-Time-bound) method can assist the planning team as it develops tangible and realistic proposals.
10. Establish terms of reference. Before you get too far along in thinking about knowledge services in the larger organization, it is helpful to attempt to specify the scope and details of your projected effort and describe any conditions or particular or unique environmental situations that might affect the work. Later attention to more formal terms of reference document will define the work and include schedules, timelines, *etc.* but at this point you need a brief (and flexible) background document in place, just to ensure that all stakeholders are in agreement and have a shared understanding of the value of the effort.
11. Propose plans. With the input and engagement of strong sponsors and champions, devise and propose plans that are in alignment with the culture, methods, and procedures in your enterprise, using the implementation framework described above or, if your organization has its own planning framework, use these concepts as a guide and incorporate them concepts into the corporate framework.

IMPLEMENT, EXECUTE, AND CONTROL YOUR ACTIVITIES

12. With one or two of the organization's recognized knowledge thought leaders serving a team lead (or leads), the planning group will begin to coalesce into sub-groups or focus teams, with specific areas of responsibility and established collaborative and cooperative links. Communities of practice (probably but not necessarily informal) will be set up, and a central group will seek to capture the results of the different mapping exercises undertaken to give attention to identified "pain points," ensuring that these are included in the larger planning focus.
13. Once the effort is underway, the different teams and groups will begin to establish baseline schedules and progress milestones. Documentation standards will be developed next, to ensure that all

participants continue to have a clear picture of steps taken and that evaluation methodologies, when appropriate, can be utilized.

MOVING FORWARD

14. As the idea of the strategic framework for knowledge services begins to take shape, review goals and expectations developed in early conversations, to determine if everyone is still “speaking the same language.” If some of the earlier concepts require adjustment, due to the organizational environment or external forces, make the adjustment and determine whether such changes will seriously alter the direction of your effort. At the same time, carefully monitor participation levels, departmental (or personal) agendas, and other variations that might impact the progress of the move toward a knowledge services framework.
15. As plans begin to come together, take the time to develop an implementation program and, when appropriate, initiate efforts to incorporate recommendations and possible changes into formal plans (marketing, business, strategic), to have them in process when they are required.
16. Develop a post-implementation strategy and identify opportunities for organizational re-structuring when required, and for establishing activity patterns that support and strengthen the move toward the development of the strategic framework for knowledge services.

PLANNING THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK: DISCUSSION QUESTIONS

In the SMR International Management Action Plans, we refer often to the knowledge services director and the information professionals in the knowledge services business unit as *knowledge thought leaders* for the larger organization. The purpose of these discussion questions is to give you a “thought-outline” in which you and your colleagues can capture and codify the required planning elements for your knowledge services strategic framework.

Once you have organized your ideas, you and your colleagues can then proceed to the next section and use the Action Plan format published there to structure your plan.

Establish Your Objective. Connect your ideas about knowledge services within the larger organization by responding to the following questions.

1. Provide a description of your background and interest in knowledge services for the larger organization where you are employed. Has the organization conducted an environmental scan focused on the role of knowledge use, KM, and knowledge services in the organization? Are the findings of the environmental scan available for you and your planning team’s consideration?
2. Why are you (and/or your business unit) playing a role in developing a strategic framework for knowledge services?
3. What do you mean when you speak about “planning a strategic framework for knowledge services”? Put into words the desired effects or expectations for this process.
4. Identify the *central value proposition* for preparing a strategic framework for knowledge services. Discuss the following: *The strategic framework for knowledge services will:*
5. How did you determine your organization’s need for a strategic framework for knowledge services?
 - Interest and direction from senior management
 - Awareness of strengthened KD/KS in external organizations and industry competition and desire to manage at my best
 - Concern about current state of knowledge services delivery within the organization
 - Conversations with internal colleagues and knowledge workers
 - Conversations with professional colleagues and current awareness of industry practices (e.g., through professional readings, professional learning activities, conference attendance, etc.).
 - Benchmarking studies
 - Knowledge services audit or needs assessment
 - Other (describe):
6. What findings or other actionable results have come from the audit, needs assessment, benchmarking studies, conversations, other sources of information, *etc.*?

7. How do your findings align with the central value proposition for the development of a knowledge services strategy framework? Be as specific as you can.
8. What is the intended scope of the knowledge services strategic framework? Are you speaking about an enterprise-wide knowledge services strategy, for a single individual functional unit (such as the unit or department with current knowledge services management and delivery responsibility), or for a group of parallel business units that focus on information management, knowledge management, and/or strategic learning?
9. How would the development of a knowledge services strategic framework be perceived in the context of other management and services delivery applications in the larger enterprise? [Note: fit your project thinking into this existing structure and test your language and logic with experienced colleagues and project owners.]

Concepts for you to consider might include:

- How are these other applications perceived?
 - What is their scope?
 - Is there potential for synergies and combining resources with other functional units, especially units with parallel or similar functions?
 - Are there lessons to be learned from past implementations?
 - At the same time, are there innovation leaders known to your planning team who can bring fresh “out-of-the-box” thinking to the strategic framework planning process? Can you interest them in hearing your plans and sharing their experiences with similar projects in other parts of the organization?
10. How would you describe the organization’s readiness for change? How has the organization responded to change management and change implementation in the past? Were these perceived as positive or negative experiences?
 11. Can you determine the organizational culture with respect to knowledge services?

Concepts for you to consider might include:

- The current KD/KS culture in the larger organization, its current knowledge-sharing activities, incentives/disincentives for KD/KS, and some history of KD/KS in the enterprise.
 - Leadership’s expressed desire for improved KD/KS and any tangible modeling or reinforcement of same. Can there be developed strong political ownership for a strategic framework for knowledge services?
 - Is there a serious business problem that can be articulated and addressed by your proposed knowledge services strategic framework?
12. Who are (or would be) the key players in the effort to develop a strategic framework for knowledge services? Is the interest in such an effort enterprise-wide and cross-functional? If so, who has the authority to enable its success?

13. Related to these considerations, who are the key players in determining organizational success? Is there an organizational development functional unit or an organizational effectiveness department in place? Are these people (managers and employees) aware of the role of knowledge services and the place of knowledge services in enterprise success?
14. Describe your experience in early discussions with colleagues and other knowledge workers about knowledge services, both within the workplace and in external discussions. Is a strategic framework for knowledge services feasible for the organization where you are employed?
15. Can you find or devise a plan for monitoring, controlling, and ultimately closing your project for creating a strategic framework for knowledge services for your organization. Considerations about the lifecycle of the knowledge services strategic framework should be anticipated and included here.

World-Class Knowledge Services. What is the status of each of the following attributes of “world-class” knowledge services in your organization? [Note: for each attribute, the functional unit referred to is the unit or department with responsibility for the management and delivery of knowledge services, e.g., information center, knowledge center, specialized library, *etc.*]

16. Is the functional unit managed from a holistic perspective? Are its services available to the enterprise at large, or to a specifically identified sub-set or unit of the larger organization? Is this arrangement satisfactory, from a service-delivery perspective.
 - Yes
 - No
 - Not sure
17. Does the functional unit and its staff engage in cross-functional projects and activities with other departments in the organization?
 - Yes
 - No
 - Not sure
18. Does the knowledge services business unit serve as a knowledge nexus or centralized knowledge services hub for the organization?
 - Yes
 - No
 - Not sure
19. Generally speaking, the knowledge services business unit is involved in what we would call “high-level” research and knowledge development? “Simple” queries are answered by the enquirers themselves, or asked of other information-focused organizations or functional units. Is this the case in your organization?
 - Yes
 - No
 - Not sure
20. In the modern organization, the functional unit with responsibility for managing and delivering knowledge services is assumed to provide value-added products, services, and consultation. Is this the case where you are employed? If yes, how does the functional unit add value?
 - Yes
 - No
 - Not sure

21. Does the knowledge services business unit have a formal marketing plan?
- Yes
 - No
 - Not sure
 - Not a formal market planing but undertake various activities that market to the identified customer base

Describe specific marketing activities, customer satisfaction tools, evaluation processes and procedures, *etc.* As you and your colleagues discuss this subject, are you aware of specific areas in customer service, marketing, and general awareness-raising that should be given attention?

22. Is there a formal strategic learning program in the organization?

- Yes
- No
- Not sure

23. What division or operational unit has strategic learning responsibility?

- Human Resources
- IT
- Knowledge Management and Learning
- Other:
- Don't know

24. What is the situation with strategic learning, training, and professional development in the organization? Is there an opportunity to establish such a function—to service the entire organization—under the management authority of the knowledge services unit?

- Yes
- No
- Not sure

25. Does the knowledge services business unit have identified advocates and champions who undertake to identify opportunities to work with the unit as it enhances its offerings to its identified customers?

- Yes
- No
- Not sure

26. Is there a formal sponsor, a member of enterprise leadership who positions himself or herself to express, model, and reinforce the value of the knowledge services function for the organization?

- Yes
- No
- Not sure

27. If not, can you identify such a person (or persons) and establish a procedure for a sponsorship role?

ACTION PLAN

| | |
|---|---|
| <p>Overall Desired Effect (Specific, Measurable, Achievable, Relevant, Time bound)</p> | <p>To: _____ (Action Word)</p> <p>What: _____ (Desired Effect)</p> <p>By: _____ (Date)</p> <p>So that: _____ (Result or Impact)</p> |
| <p>Actions (Work Breakdown Structure)</p> | <p>Action _____ Who _____ When _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____ Who _____ When _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____ Who _____ When _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____ Who _____ When _____</p> <p>Action _____</p> <p>Action _____</p> <p>Action _____</p> |

| | |
|---------------|---|
| Assets | <p>Sponsor:</p> <p>Assigned (or potentially assigned) people:</p> <p>Champions:</p> <p>Other Assets (partners, experts)</p> |
|---------------|---|

| | |
|----------------|---|
| Threats | <p>Threat:</p> <p>Response:</p> <p>Threat:</p> <p>Response:</p> <p>Threat:</p> <p>Response:</p> |
|----------------|---|

| | |
|---|--|
| Contingency Plan and Exit Strategy | <p>Trigger:</p> <p>Response:</p> <p>Trigger:</p> <p>Response:</p> |
|---|--|

AFTERWORD: MANAGING STRATEGIC CHANGE

Knowledge Workers

- Educated
- Able to apply theoretical and analytical knowledge
- Willingness to take different approaches to their work
- Possessing a different mind-set
- Committed to continuous learning

Peter Drucker

In 1994, writing about the “age of social transformation,” Peter S. Drucker describes what the editors of *Atlantic Monthly* called “an economic order in which knowledge, not labor or raw material or capital, is the key resource.” In the essay, as he writes about the rise of the knowledge worker, Drucker makes it clear that the move toward a “knowledge economy” is more than simply a rearranging of the workforce:

The rise of the class succeeding industrial workers is not an opportunity for industrial workers. It is a challenge. The newly emerging dominant group is ‘knowledge workers.’ ...the great majority of the new jobs requires qualifications the industrial worker does not possess and is poorly equipped to acquire. They require a good deal of formal education and the ability to acquire and to apply theoretical and analytical knowledge. They require a different approach to work, and a different mind-set. Above all, they require a habit of continuous learning.

As Drucker was helping us understand the basic differences between what was expected of workers in previous societies and today’s knowledge workers—which term he had coined in 1959—an additional and critical attribute of the new workplace was being identified. During that same last decade of the previous century, John P. Kotter and other influential management leaders were stating that those same knowledge workers would also be required to manage change, to not only identify the changed work environment in which they were expected to perform but to adapt to the requirements of change, to ensure that the parent organization would continue to thrive.

INEVITABLE AND DESIRABLE CHANGE

Change is recognized as inevitable and desirable. Change influences the organization’s knowledge thought leaders as they seek new and better ways for delivering services.

As a fundamental component of the management function (and as noted at the beginning of this Management Action Plan), change is now recognized as inevitable. If pursued properly and with an eye toward long-term improvement, it is also desirable. This recognition continues and will continue to have much influence on how the organization’s knowledge thought leaders—and the people for whom knowledge services are delivered—succeed in their work.

With knowledge services, performance and innovation are uniquely connected, as those with responsibility for managing knowledge services seek to find new and better ways for delivering services to identified constituent users. We speak about knowledge services as putting knowledge management to work, the practical side of KM, and managing change in that context was connected, perhaps unwittingly, by Drucker in his *Managing in a Time of Great Change*. In the book,

Drucker described change management and entrepreneurial thinking in a quotation that is almost custom-made for information professionals and knowledge thought leaders:

An organization must be organized for constant change. It will no longer be possible to consider entrepreneurial innovation as lying outside of management or even as peripheral to management. Entrepreneurial innovation will have to become the very heart and core of management. The organization's function is entrepreneurial, to put knowledge to work—on tools, products, and processes, on the design of work, on knowledge itself

It is a difficult and sometimes complicated affair, this “putting knowledge to work.” In fact, the expectations (and aspirations) captured in the phrase had entered the lexicon of the knowledge worker as early as 1916, when it was adopted as the official slogan of the Special Libraries Association (SLA). As that organization and its service delivery emphasis on practical and utilitarian service delivery for information, knowledge, and strategic learning moved forward in the 20th century, we can see a natural transitioning into knowledge service's objective of putting knowledge management to work. It is not hard to see why. Putting knowledge management to work and identifying the practical side of KM—and then developing applications in support of the practice—must by definition connect to doing things differently, to changing behavior and the thought processes that underlie behavior (when behavior is thought about at all).

The Four Principles of Change Management

1. Sponsorship
2. Champions and Change Agents
3. Organizational Readiness and Managing Resistance
4. Communication Planning

To meet that challenge, smart information professionals and their leaders in the organization turn to change management. At this point in the history of management as a science and as a profession, there are many approaches to dealing with change, change management, and change implementation, but for many managers (including information professionals with management responsibility), the best place to begin is with established change management principles. The authors identify four fundamental principles for successfully managing change, and while recognizing that there are inevitably any number of sub-concepts that support and enhance successful change, the focus in the knowledge services environment is on generally on the following:

- *Sponsorship*. This change management principle identifies an influential leader who commits to a consultative role in the change process and agrees to express, model, and reinforce his or her commitment
- *Champions and Change Agents*. The emphasis here is on identifying and obtaining commitments from influential people willing to speak about the benefits of change and who will encourage adoption (champions are usually thought of as early adopters and change agents as individuals who will express and model the new behaviors to a population of users).

- *Organizational Readiness and Managing Resistance.* This change management principle recognizes that users and affected stakeholders are engaged early in the process and, when appropriate, invited to participate in general discussions about the change and—in some situations—to participate in planning change. This principle essentially diffuses resistance or, at the very least, gives those resisting an opportunity to be part of the effort to enable useful and productive change.
- *Communication Planning.* Of critical importance, this change management principle engages users early in the process and connects with the above principles in a coordinated and consistent manner. An example of an effective application of this principle is the development of a calendar of events or project plan that incorporates elements of a consistent message in language that matches that of the organizational culture in which the affected stakeholders are employed.

The Basic Steps of Change Management

- Conceptualize
- Prepare the organization
- Organize the planning group
- Plan
- Decide
- Manage the individual
- Surface and address resistance
- Implement
- Evaluate

Susan Curzon

When looking to enter into the change management process for knowledge services, good background directions can be found in Susan Curzon's basic list (noted at left), provided a generation ago. Of course the first step is conceptualization, and in any organizational effort, moving toward a new or different management framework requires those with management responsibility to begin their thinking and their discussions with their colleagues.

Before change management can begin, though, good intentions must be tempered with a strong dose of reality, with asking a fundamental question: Is the organization (or its knowledge services business unit) ready for change? It is all well and good to *want* to seek to transition the enterprise to a knowledge culture. It is quite another thing to take on such responsibility if the organization is not "change ready," as we generally put it. About ten years after Curzon, both Rick Maurer and Rosabeth Moss Kanter took on the study of organizational change readiness since, for the two of them, the success of any change process depends on the outcome of this determination. Maurer offers specific guidelines that continue to relate well, especially for knowledge services, and he advises organizational thought leaders to:

- **Build a foundation.** Ask how you can cultivate a strong relationship with those affected by the change, or how you can use the change to build relationships with other stakeholders.
- **Communicate with constituents.** Provide a context and a compelling business case for the change and, when you can, engage in face-to-face conversation about the change and its implications. At the same time, find ways to communicate informally with people at all levels in the organization about the change, throughout the life-cycle of the change.
- **Encourage participation.** To what extent are you identifying all the individuals and groups that have a stake in the outcome? Have you found way to involve them in the planning making decisions?

- Expect resistance. No matter how well change is planned, resistance will occur, so you must make special efforts to monitor people's acceptance or resistance to the proposed change and, at the same time, engage people in dialogue so that their concerns can be heard and understood.
- Create rewards and benefits for stakeholders. Have you found ways to demonstrate that the change will be mutually beneficial for all stakeholders? How do the affected people know that the change will benefit them?
- Lead the change skillfully. Finally, you must take special steps to ensure that you have created alignment among diverse interests, that critical feedback is invited and will be given serious attention, that the compelling vision that you and your fellow change leaders have created is articulated to all stakeholders, and that people are informed about the change as it moves forward.

Kanter, when asked how organizational leaders get past “the rhetoric of change,” replied with characteristic directness, offering three key steps for information professionals and their organizational managers:

Change of any type can be pursued successfully only with a thorough understanding of overall organizational culture, and how that culture is likely to react to the change being sought. A potentially negative reaction need not derail change, but it must be taken into account in pursuing that change.

- They put actions behind their words; talk is cheap. Leaders that do the best job of leading change—first of all, they have a vision of where they want to go that's well-articulated, communicated wisely, and communicated repeatedly. That way, everyone has a sense of the destination. There's no point in talking about change if you don't know where you want to go.
- Second, they look for exemplary practices—innovations—that are already occurring in the company that reflect the new way that they want to operate. Leaders puts those in front of people as tangible models of what can be done.
- Third, they organize to manage a change process in which projects help move the company to a new state of being. And they put real resources into it. Leaders give people responsibility. They set in place new measures that tell people what the standards are and measure progress toward the goals. They give feedback to an organization. They look to see whether policies, practices, systems, and structures support the change goals.

Kanter's advice is particularly appropriate as information professionals with management responsibility for knowledge services turn their attention to the specifics of change that are required in the workplace. In moving to an organizational knowledge culture, particular attention must be given to ensuring that the relevance of the function continues and is not dissipated by external and non-essential distractions. At the same time, staffing for a knowledge-centric organization requires new and specifically developed skills and competencies which naturally include the ability to adapt to change. This sometimes over-whelming picture is all part of the transformation of the service delivery focus for knowledge services, and information professionals and knowledge thought leaders must recognize the enormous role of the larger and over

-arching organizational culture and its influence in determining success or failure in managing change. John P. Kotter—to become one of the most famous experts in change management—published his famous “eight-stage process for creating major change.” As Kotter sees it, organizational change must be “anchored” in the culture, which means that information professionals and others with responsibility for moving the organization to a knowledge culture must make every effort to understand the larger organizational culture before they attempt to make the change. In his book on the subject, Kotter suggests that successful change management has four particular characteristics which we can see relate specifically to change management in the knowledge services environment:

Successful change depends on results, since new approaches usually sink into a culture only after it is very clear that they work and are superior to old methods.

- Successful change requires a lot of talk, for without verbal instruction and support, people are often reluctant to admit the validity of new practices.
- Successful change may involve turnover, since sometimes the only way to change a culture is to change key people.
- Successful change makes decisions on succession crucial, since if promotion processes are not changed to be compatible with the new practices, the old culture will reassert itself.

Kotter then puts forward his eight-stage process, advising those responsible for managing change to:

1. establish a sense of urgency
2. create the guiding coalition
3. develop a vision and a strategy
4. communicate the change vision
5. empower broad-based action
6. generate short-term wins
7. consolidate gains and producing more change
8. anchor new approaches to culture

Obviously the transformation of any knowledge-centric organization into an enterprise built on a knowledge culture, with its broader and more demanding knowledge services responsibilities directed to a larger marketplace, is essentially an operational restructuring. At the same time—and surprisingly still posing a challenge to the successful development of a knowledge services structure—connections with information technology continue to come into play, as can be seen in the description of change management published by Ann Rockley in 2003, a definition that can—with a little imagination—be transferred to a definition of change management for knowledge services:

Change management is managing the process of implementing major changes in IT, business processes, organizational structures, and job assignments to reduce the risks and costs of change, and to optimize its benefits. Change management is focused on the issues of managing the resistance and discomfort experienced by people in an organization when new processes or technology are introduced.

As Rockley makes clear, for many people the tasks associated with change are difficult. In dealing with (or at least attempting to deal with) that resistance and discomfort, organizational leadership has a responsibility to recognize and attempt to understand the various barriers that inhibit change.

There are, of course, practical guidelines for dealing with resistance, and Sharon Penfold discovers useful and commonsense advice provided by experts in the Human Resources field:

- identify the type of resistance (expected as well as in evidence)
- analyze (based on the factors of intensity, source, and focus)
- look for behavior (emotional) and rational (system) factors
- view resistance as rational, not irrational
- ask what useful purpose the resistance is serving
- identify real or perceived negative consequences of the change
- weaken the apparent link between the change and the negative consequences
- reduce rather than eliminate resistance (e.g., avoid surprises, ensure participation)
- work directly with individuals affected to deal with their personal concerns
- use a mix of push and pull styles to influence individuals, dependent on each situation and individual.

From the perspective of many managers, change and change-related activities are traditionally considered—and are expected to be—disruptive and painful in the workplace, but that does not necessarily have to be the case. With a clear understanding of the elements of the change management process that support and enhance knowledge services, change can proceed for the common good. Indeed, for many leaders in the field, a focus on resistance is less productive than an emphasis on the benefits, and, as Lyndon Pugh accurately describes, “managers have already at hand the tools to do this, in addition to their skills in understanding the psychology of the people they work with.”

The key motivational structures, for Pugh, are job enrichment, job enlargement, and team structures. With them, Pugh connects successful change management (as do the present authors, as noted below) with Maslow’s recognition that an essential higher order need is self-esteem, coming from, as Pugh puts it, “a belief in one’s own ability and also in

How Managers Ensure Successful Change

- Make work challenging
 - Give people the responsibility for organizing themselves and let them choose how they work
 - Give people power
 - Help people learn
 - Use every channel of communication possible “and tell people everything you can”
 - Share leadership
- Lyndon Pugh

one’s value to the organization” and involving self-analysis and the achievement of “a realistic and honest view of one’s capabilities.” Such success also means that for managers, there is an obligation to encourage people to understand what they can accomplish and to provide support for them to do so. At the same time, change management, in Pugh’s assessment, “involves that most difficult of things, particularly for managers, that of seeking and accepting feedback from others.”

Pugh also gives a generous and surprising nod to R.H. Cox, who writes about self-esteem in sports: “Learning and development,” Pugh writes, “...play a part in increasing self-belief,” and he notes that—from the change management perspective—self-esteem is important for the long-term, an “essential pre-requisite for sustaining motivation. Once [self-esteem] is weakened, high-achievers become risk-avoiders.”

Pugh then provides his own lists for success with change management, for ensuring that—as we would frame it—the fear of “imposing” a knowledge culture is offset by a willingness and a desire to work with change management and change implementation principles to bring about a knowledge culture. In his first list (left), Pugh describes how managers bring about change success, to make the enterprise an interesting place to work.

Pugh follows this advice with a good list of specific managerial actions that will, he states, lay the foundation for a well-motivated workforce. To accomplish this important goal, managers need to

- Convince people what they can achieve in the new environment
- Design jobs to permit development and learning
- Engage in real and ongoing structural change
- Foster cultural change
- Develop and sell a vision
- Give people responsibility
- Communicate
- Change themselves
(and take a good look at their own management patterns)
- Dispense with bureaucratic behavior

When change management for knowledge services works, there is no better time to be the knowledge thought leader for the organization. A fine example was published in 2007, in Linda Stoddart’s description of the development of a knowledge sharing strategic framework at the United Nations. The changes put in place resulted in many solid accomplishments, but of particular importance was the success of the change management process in creating a sense of community with respect to knowledge services. As described by Stoddart, “A sense of community has been fostered by the creation of a network of local points providing content across the organization worldwide.... This community approach has helped encourage knowledge sharing and a transition toward a more collaborative organizational culture.”

“Establish a sense of community by creating a network of local points to provide content across the organization.”

—Linda Stoddart
United Nations

Notably, in this work the capture of the incremental steps Stoddart and her team undertook provide a strong model that, not surprisingly, incorporates important directions and reinforces their validity:

- Articulate the goal and establish focal point community
- Conduct a knowledge services audit
- Create an internal communications working group
- Reach out to all stakeholders
- Conduct planning and strategy focus training workshops

In recognizing and attempting to understand and ameliorate barriers to change, enterprise leadership carries out one of management’s most important responsibilities, the ability to sponsor success. The concepts we connect with sponsorship are often described in these Management Action Plans, included in a variety of contexts. Equally critical though (if not more so) is the role of sponsorship with respect to change management. Whether required for a single operational function or enterprise-wide, change cannot succeed unless senior management agrees to be involved and, indeed, to sponsor the change. When Drucker defined entrepreneurial innovation as the very heart and core of management, he was establishing that change must be recognized and managed, and it is in leadership provided by change sponsors that change succeeds.

The larger organization does, of course, include other people who have an interest in and perhaps enthusiasm for the success of the KD/KS process, and who are willing to be part of change as the process evolves. As noted earlier, partners and other knowledge workers who engage with the functional unit responsible for knowledge services are quick to speak about how valuable the products, services, and consultations of the unit are in their work, and in their collaborative work together in inter/intra-departmental projects, they come to know knowledge services well. But knowing and being in a position to influence change are two different things.

Likewise the good intentions of champions and advocates. These enterprise colleagues may or may not avail themselves of the contributions of the knowledge services function to their work. And while they may have good “feelings” about the place of knowledge in the organization, they are not in a position to do much more than say so, and often only when prodded or encouraged so to do. They are individuals who understand the role of change in the larger organization and who are interested in seeing change attempted but like the partners described above, they are not in a position to lead the change.

Slightly up the change-management “chain,” so to speak, are the organization’s change agents. These people—found at all job levels—are people who can help with the change by providing influence where it is needed. While your champions and advocates can speak as early-adopter users who understand the benefits of the change, change agents

are individuals the knowledge thought leaders have identified as people who can be indoctrinated to not only take advantage of the change but who are in a position to model the changed behaviors to a population of users.

Enter the knowledge sponsors. These enterprise leaders understand the KD/KS value proposition. They are senior managers who have learned—either through experience or through their interactions with the organization’s knowledge thought leaders—that the knowledge services function brings tangible and measurable benefits to the larger organization. They make it their business to authorize, validate, and demonstrate ownership with respect to knowledge services, and they take a consultative role in working with the information and knowledge specialists who have responsibility for the success of the knowledge services function. Quite often in supporting the idea of the enterprise as a knowledge culture, these senior leaders enter into a sponsorship agreement with the larger organization, outlining mutually accepted and agreed-upon actions they will take to express, model, and reinforce their connection with knowledge services. Working with the organization’s information professionals and knowledge specialists—who now take on a catalysis role in change management analogous to the role they have in knowledge services—knowledge sponsors ensure that the place of knowledge services is indeed one in support of the organizational knowledge culture.

Sponsors

Sponsors are senior leaders who enter into a sponsorship agreement for knowledge services with mutually accepted and agreed-upon actions to express, model, and reinforce their connection with the knowledge services function.

For an example, we might look back at an earlier approach to change management. Many remember an advertising campaign of several years ago, one which asserted that “change imposed is change opposed.” Today, in some circles, the same is said about knowledge services, that the development of a knowledge culture cannot be imposed upon a group of workers or made obligatory, at any level. No one disputes this but some even posit that there is no advantage to be gained in attempting to create a knowledge culture for an organization, institution, or enterprise. The present authors beg to differ. While we agree that imposed change is quite naturally wrong, if the goal is important enough, as we believe it is when we speak about the value of organizational success in an enterprise managed as a knowledge culture, the organization’s leaders can—and indeed have an obligation to—identify how the principles of change, change management, and change implementation will lead to the desired effect they envision for the larger organization.

A CHANGE MANAGEMENT STRATEGY FOR KNOWLEDGE SERVICES

When preparing the organization for developing and sustaining an enterprise-wide knowledge culture (and implementing the principles of knowledge services to do so), change management takes on a different or “special” cast. As we pursue our discussions about how we will lead the change, the situations are very appealing, because they enable us to envision just how good we can make our workplace. On the printed page or computer screen and in our conversations with our colleagues, it all looks very nice. The apparent ease of transition from idealized and theoretical KM to the practical, day-to-day workings in each situation appeal to the tidy and methodical perspective that many of us bring to our work.

But there is a different side to the story. Organizational change is hard, and while it is often not too difficult to articulate a new strategy or a restructuring, or to demonstrate the potential value of a desired result (as described earlier in those references to the pleasant intellectual discussions that take place), bringing any change into an organization is going to be difficult.* Hopefully concepts and ideas like those described in essays like this are helpful, but even when they are, we are forced to wrestle with dealing with change management and change implementation in our specific organizational environments.

What is hard—indeed, the hardest part—is getting the larger organization to understand the value of the change and to then accept the change as it becomes part of the organizational effort. As we speak about so often—almost unendingly in the management community—people and organizations just naturally seem to resist change. Nevertheless, if information professionals and knowledge workers truly desire to participate in the process of moving the organization to a knowledge culture, and indeed, to lead the process (which they should do), there are steps we can take:

1. *Define the change.* If we are not sufficiently clear and precise about what will be required (not just the desired end result but the activities that will be needed to achieve that result), it will be far too easy to resist or passively avoid any desired change. In terms of moving to a knowledge culture, to establishing a KD/KS framework for the knowledge transfer process in your organization, let the concepts and specific roles described here provide you with talking points, a basis for articulating the specific changes you desire to the people who can help you initiate change. This leads to....

* The techniques offered here are standard human change management principles. Interested readers might refer to Chip Conley’s *How great companies get their mojo from Maslow*, which relates Maslow’s hierarchy of need to change management, a connection with particular resonance as information professionals and other knowledge workers seek to prepare themselves for their profession’s future role in society.

2. *Find your sponsor.* Before you begin, ensure that you can establish strong sponsorship for whatever change will be required. Despite the verbiage that supports “grass roots” ideas and discussions about “demonstrating feasibility,” there is a strong need for an advocate or champion (or several) to take a stand. Additionally, that person or group of people is going to be required to move from simply championing the change (“that’s a good idea”) to actual participation (“what you’re proposing will impact my work—I’ll support it, I’ll tell people how this helps me and the company, and I’ll reinforce the change”). Usually there is a point in the change process where people’s behaviors and decisions need to be influenced on a substantial scale. That can’t happen unless there is leadership buy-in and a commitment to buy-in that is expressed in the words and actions of enterprise leaders.
3. *Create alliances and identify change agents.* The organizational shift to a knowledge culture is initially the result of an alliance (or in many cases a group of alliances). Utilize the various elements of the many definitions of KM that fit your situation, match them with information management and strategic learning in knowledge services, and work to establish a KD/KS environment with knowledge services as your management methodology and service-delivery focus tool. Then integrate those alliances. Start with like-minded functional leaders and thought leaders in your organization and join with them, with all of you working as change agents and identifying areas where you and they share concerns related to the full range of information/ knowledge/strategic learning interests. Look for areas where knowledge sharing is needed but is not taking place or not working well, and engage with these colleagues to come up with integrated solutions. The end result will benefit all business units in the organization, realizing an enterprise-wide holistic solution.
4. *Use caution.* Be wary of quick fixes and reactive responses.* When there is an established desire for improvements in the knowledge transfer process within the organization, leading, perhaps, to the beginnings of a knowledge culture, many of the players (including sponsors) naturally start to look for mere tools or techniques. What you will hear is “Ah, hah! Now we are ready for KM/knowledge services. Find me the best software application and let’s make this happen!” Be careful. It’s not just about software.

Keep in mind that at this juncture in the knowledge services process you will be required to reiterate to your colleagues and your organization’s leaders that culture shifts require new ways of doing work and new ways of relating to stakeholders in the enterprise, and in addition to strong reinforcement from sponsors, you will require a variety of approaches and tools. Understand clearly that you will need a comprehensive approach that involves the spectrum of KD/KS

* Not to be confused with quick wins as incremental steps towards the overall objective, as these can be powerful change forces.

solutions and the integration of appropriate functions and approaches. With such an approach, you can position yourself to ensure higher value realization and smoother change management, resulting in real, sustainable change for the larger organization. This is the hard work of knowledge services. Putting knowledge management to work and using knowledge services to enable your practical solution is hard. But it can also be said that putting knowledge services in action is the most rewarding part of the entire effort.

THE ORGANIZATIONAL KNOWLEDGE NEXUS: A CAUTIOUS PREDICTION

This Management Action Plan concludes with a guarded prediction about knowledge transfer in the future. If our studies and observations demonstrate a continuing direction toward the acceptance of business value for knowledge (as we feel they do), and if, at the same time, enterprise leadership continues to strive for strengthened KD/KS throughout the organization, we expect this knowledge transfer process to take place in an organizational environment that of necessity will be established as a knowledge culture.

We also predict that the role of specialist librarians, information professionals, and other knowledge workers and their services to the organization will be one of knowledge leadership in this environment. This evolving role will be based on their knowledge expertise and their willingness to assume knowledge leadership for the larger organization, of being the organization's knowledge thought leaders and taking on responsibility for management enterprise-wide knowledge services. However that activity is currently structured or otherwise implemented in the organization, it will be strengthened if it is shaped to serve as a centralized function, a knowledge "nexus" or a knowledge "hub" for the larger enterprise.

Today's knowledge workers and knowledge leaders are the professionals who are best qualified to manage this function. Ideally, this operational function will assume formal responsibility for all information, knowledge, and strategic learning development, management, and delivery for the larger enterprise. This centralized "nexus" function will indeed be a function. It will probably not be a space or a "place" (unless as an operational function it has responsibility for maintaining a collection of artifacts such as books, bound journals, and the like, but that is another story). In our envisioned (and perhaps somewhat idealized) scenario, the knowledge nexus—the knowledge services delivery function and the management of knowledge assets—plays a comprehensive and holistic role for the entire organization and makes a tangible and measurable contribution to mission-critical success.

Even in complex organizations, or in organizations that cannot support such a commanding role for a knowledge-focused operational function, the power of such an embedded and visionary philosophy can effectively move traditional “reactive” service delivery (and even “proactive” service) to higher levels of organizational impact. It is a strategic approach that not only allows the natural synergies among the disciplines that are the elements of knowledge services (information management, knowledge management, and strategic learning) to succeed. Indeed, with this approach there is the added opportunity of taking on a more interactive and integrated function across the larger enterprise and (perhaps more important) an integration opportunity with specific business processes. In fact, the more of this latter integration there is the more progress the enterprise can make towards building that knowledge culture to which so many organizations aspire. It is a scenario that today’s information professionals and knowledge workers can envision for themselves and, with considerable enthusiasm, work toward achieving.

For information professionals, specialist librarians, and other knowledge workers, the future looks bright. They are—or will become—the knowledge thought leaders, knowledge consultants, and knowledge coaches for their parent organizations. They recognize that putting KM to work is critical to their and their organizations’ success, and they delight in bringing a practical approach to their work through the convergence of information management, knowledge management, and strategic learning. As organizational leadership and management come to understand the relationship between technology and knowledge and to understand better the relationships between quality in knowledge transfer and organizational success, knowledge services—as a management and service delivery methodology—becomes the route to that success. These information professionals are prepared and ready to play their part, leading their organizations in the creation of knowledge value through KD/KS.

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