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**Building the Knowledge Culture**

## The New Knowledge Services: The Next Decade

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### Program Description

Corporate and organizational management requires a unified approach to knowledge sharing. For efficiency and effectiveness, an enterprise-wide knowledge strategy must be provided, a practical approach to managing knowledge. Stand-alone functional entities cannot meet this need and an institutional knowledge culture, engaging all functional units (since all units develop and share knowledge) must be in place. The new knowledge services - a practical way to deal with knowledge - meets these needs.

### Introduction

I've been asked to speak today about "The New Knowledge Services – The Next Decade," and I'm delighted to have been assigned that subject.

I'm fascinated – have been for many years – with what's happening in the world of knowledge management (KM), knowledge services, and knowledge strategy.

And while I don't *claim* the title, I suppose I am something of a *futurist*. I'm always thinking about – in terms of KM, knowledge services, and knowledge services – about what our professional life is going to be as we continue to move on into what I've been calling "the knowledge age."

Indeed, we've learned so much and make such good use of knowledge nowadays I'm tempted to think we're living in some sort of "Golden Age of Knowledge Sharing."

But that might be a little over-the-top, so I'll be satisfied with this "knowledge age," which has followed in a neat little pattern the earlier great ages of history, the age of agriculture, the industrial age, and – from after World War II up to a couple of decades ago – the information age.

Now we're in the knowledge age, and I've been asked to speak with you about what's coming, about how we're going to deal with living and working in the next few years of this great time in intellectual history.

And I want to put that conversation in a different context:

Let's talk about you.

What are you doing with your life?

What are you doing professionally?

What are your goals for a successful career?

What do you think about, when you think about your work and how you're going to work in the future?

Let's talk today about AMBITION. And let's put the focus on you.

As specialist librarians – as strategic knowledge professionals – you're working in "the knowledge domain." You work with knowledge, with strategic knowledge for your company or organization, and your job is to focus on how knowledge is used to advance – to move forward – the goals of your employing organization, to ensure that the company or the organization succeeds in achieving its mission.

This is “big-picture” stuff. This is not about your ordinary day-to-day stuff. You can get that elsewhere. This is about **you**, and your impact on the world of knowledge and how knowledge is used (and appreciated) in your workplace.

And since we’re all part of the “knowledge domain,” your career is a career in which you are called upon to direct knowledge development and knowledge sharing – that thing we call “KD/KS” – and your career is impacted by and is going to be further impacted by KM, knowledge services, and knowledge strategy.

And today we’re going to talk about knowledge services, where it’s been and – most important – where knowledge services is going.

We’re not going to be spending a lot of time worrying about definitions. You know what KM is (and if you don’t, Larry Prusak – whom we heard speak this morning – refers to KM as simply “working with knowledge” – that’s as good a definition as anyone has come up with, I think.)

Nothing more than that. You’re working as a specialist librarian, or in one of the fields affiliated with specialized librarianship.

You’re working with knowledge.

And you’re a knowledge manager, whether you mean to be or not. You work with KD/KS, and in your company or organization the knowledge you work with affects how successful the company is. You’re working with strategic knowledge and you’re a strategic knowledge manager.

And you know what knowledge services is, because you hear me and my colleagues talk about it all the time (and lots of other people, too, I suppose). But especially me. I just keep running my mouth, and I’m always telling people about knowledge services.

In fact, I’m often defining knowledge services, working the definition into conversations and talking with people about how knowledge services is the convergence of information management, KM, and strategic learning. All pulled together for the benefit of your employing organization. And knowledge services, as we know, is both strategic and operational, and your company can’t succeed without attention to knowledge services.

So today we’re going to look at where we’ve been, in terms of KM, knowledge services, and – yes – knowledge strategy, because the link that ensures your company’s success is the connection between knowledge strategy – which you’re involved in even if you don’t think about it – and the corporate or organizational business strategy, the corporate mission that enterprise leadership has established for organizational effectiveness.

It’s all very simple when you get right down to it, isn’t it? This connecting what you do with the success of the place where you work?

Today, we’re going to take a look at where we’ve been, and where we’re going as we move into this “new knowledge services” I’ve been asked to speak with you about, this “golden knowledge age.”

And to do that, to look at our future, I’m going to suggest that we go back a few years.

Yes, I know some of you know I wrote the centennial history of SLA (*SLA at 100: From “Putting Knowledge to Work”® to Building the Knowledge Culture: The Special Libraries Association 1909-2009* (Alexandria, VA USA: SLA, 2009) but don’t worry. We’re not going to go back 100 years!

Let’s just go back a decade or so. Let’s think about what was going on in our professional lives just ten years ago, in 2001 (and just to keep things from getting too complicated, let’s just look at the first half of 2001, so we won’t get into the horrors of the last half of that infamous year).

People were talking about KM then. And, indeed, some organizations and the departments of engineering in some universities and a few other folks were doing some work with KM, trying to get managers in companies to recognize how important it would be – to the success of their companies – if they could better “manage” corporate knowledge, that knowledge that Tom Stewart had identified in 1997. Tom called it *intellectual capital*, and he asserted that intellectual capital – corporate knowledge – is the company’s most important asset. He was right, as we’re learning more and more every day.

In 2001, we were hearing what Tom had to say, and we weren't about to disagree with him. But we had a problem. We couldn't get management to come along.

Ten years ago, executives just could not "get their arms around" KM, and at SMR, we came to the conclusion that something had to be done about that.

So in that year, in 2001, we put forward our notions about knowledge services. We wrote about it in SLA's magazine, *Information Outlook*, in an article published in June 2001, in an article called "Knowledge Services: Your Company's Key to Performance Excellence." In the article, we very consciously took up the challenge of addressing the strengths of converging information management, KM, and strategic learning into a corporate-wide management methodology that would lead to corporate success.

I also wrote about knowledge services in a book a couple of years later (*Beyond Degrees: Professional Learning for Knowledge Services*, (K.G. Saur, 2003), and I've been focusing on knowledge services ever since. From what we can tell – both from our work at SMR and from my own observations – the concept of knowledge services as an operational function has caught on, and we now see many companies and organizations working with knowledge services to ensure that KD/KS moves forward as the company goes after corporate success.

And as we worked, we became very quickly aware of one thing: there was no real "place," you might put it, in many organizations for knowledge services. There wasn't a spot – often – in the organizational structure.

There were lots of bits and pieces, and indeed, in 2001, the knowledge domain was made up of discrete disciplines, which by then had become – or were moving to be – specific, disconnected entities in and of themselves.

We were seeing polarization, and silos, and smokestacks, as people tried to work with knowledge, and it just wasn't working. The "sharing" piece of knowledge development and knowledge sharing was – somehow – getting lost in the process.

Yet change was coming. Yes, I wrote my stuff on knowledge services, but I wasn't the only one. Many, many people got involved in KM – many smart and well-connected people, people like Larry Prusak and Tom Davenport and Tom Stewart were really out there beating the drum about KM. Lots of others, too, many people getting really involved in KM, knowledge services, and knowledge strategy.

And then we had all that wonderful technology, all those major developments we began to hear about. By 2001 leaders like Steve Arnold were predicting things like emerging technologies that would take the burden of crafting the query off the user. Or just-in-time searching that would be built into the work-flow context.

All that happened, and much more, and we acquired all these terrific tools and techniques, even things like that pervasive tool we've come to love called SharePoint, which we first knew – in 2001 – as the SharePoint Portal Server.

And all those gadgets, the smart phones, the tablets, on and on and on, all leading to critical changes in the way we work. Even changes in the language we use, with many companies not talking about the "corporate intranet" any more, referring to it as "the corporate KM system." And why not? If the (formerly) "corporate intranet" is where the company's people go to create and use company knowledge, why not call it "the corporate KM system"?

And the increasing, almost overwhelming domination of social media (OK – in business we can call it "business collaboration"), bringing with it a major transition in how strategic knowledge professionals and knowledge strategists do their work. To the extent that in the knowledge domain and in operating a knowledge-support function, we moved from what was formerly a "one-to-many" workplace perspective to – with the growth of technology – a "many-to-one" way of working. And then to where we are now and, I would predict, to where we'll be in the future, to a "many-to-many" workplace framework.

And then there have been those changes in the science of management itself (some call it "the art of management"), particularly in management perceptions – and expectations – about how knowledge is used in the organization.

Today's management leaders – it's becoming clear – require an enterprise-wide knowledge strategy that matches the corporate business strategy. Everywhere I look, I see signs that we're moving in that direction. Among enterprise leadership – regardless of the type of enterprise – there's been a sea-change in the perception of value with respect to enterprise-wide knowledge management (KM), and we now have – in many companies and organizations – an enterprise-wide recognition that KM, knowledge services, and knowledge strategy are critical to organizational success.

At the same time, though, there's been a certain level of uncertainty amongst some management types. They recognize and acknowledge the value of knowledge and knowledge sharing, but sometimes they don't necessarily understand how KD/KS might create a more cohesive organization, and that's where your role is going to come in. You're going to be the people who will lead managers – that is, those who don't know – to understanding the value of KD/KS in organizational effectiveness.

And why, you might ask, is there a need for this “new” knowledge services?

Well, there are all kinds of reasons why, but we don't really need to be concerned with the “why,” do we? We know the world has changed and is constantly evolving, and as my friend Denise puts it, the needs and uses for knowledge services have changed, too, and we don't need to know why. We just need to go out there and figure out how knowledge services can be best used, for whatever need knowledge services is needed for.

For us, for our discussion today, we want to focus on what's coming, especially in the fields we represent, fields like records management, corporate archives, specialized librarianship, even other knowledge-related fields like research management. What's going to be happening in these fields? What's our work life going to be like, a few years down the road?

Who are we going to be, and what are we going to call ourselves?

Let me offer some suggestions about where we're going, based on my own observations and, clearly, limited to my own perspective.

Let's talk first about who we are, those “knowledge professionals,” those of us who work in the knowledge domain as we defined ourselves a little earlier today. Naturally, Peter F. Drucker's famous term – **the knowledge worker** – comes into the picture. These are the employees, as Drucker described them in his 1973 *Management: Tasks, Responsibilities, Practices* who undertake such activities as writing, analyzing, and advising.

They are often not thought of as knowledge professionals, *per se*, and much of this work is performed by subject-matter specialists in all areas of an organization. And it is this practice which leads, in some organizations, to the “promotion” (quote – unquote) of these individuals – people who act and communicate with knowledge within a specific subject area – to a larger or broader organizational role as “knowledge manager.” In this case, the connection with formal or academic KM learning, or even professional development or strategic learning, is often limited or if undertaken, self-driven.

A second role is that of the strategic knowledge professional, often thought of as “information professionals,” “content professionals,” records managers, archivists, specialist librarians, and working in other related roles supporting the management of the organization's knowledge domain.

These employees can usually be counted on to contribute to an enterprise-wide understanding of a subject or group of subjects through focused analysis, design and/or development, and they use their research skills to define problems and to identify alternatives. They generally connect to professionals in other disciplines and work (generally) with captured knowledge – tangible information – in physical or electronic repositories, with the distinction being that the knowledge these professionals manage is strategic, directly connected to organizational or corporate effectiveness.

Then there is the third “level” of knowledge professional, the organizational or corporate **knowledge strategist** whose work is that generally thought of as the management of knowledge services.

With knowledge services usually defined – as we noted – as the convergence of information management, KM, and strategic learning, or, perhaps better put, as ***developing and implementing strategies for managing information, knowledge, and corporate or organizational learning***, these activities provide focus for the knowledge strategist for matching the corporate knowledge strategy with the organization’s business strategy or mission. As employees, knowledge strategists are expected to design and plan knowledge-related activities and policy, and are particularly expected to give attention to future knowledge-related roles and activities that will affect corporate or organizational success.

And a very important distinction – with respect to knowledge strategists – is that they are not necessarily people who have been educated to have or simply possess “information skills,” not as we use the term to connect with the work of information professionals like specialist librarians and the other information and knowledge professionals I just mentioned.

Indeed, for the knowledge strategist there often no connection with librarianship or any of the other discrete disciplines that make up what we usually think of as the components of the knowledge domain.

These are all important disciplines, but they are primarily about collections, including of course modern digital collections. As my partner Andrew Berner has pointed out, one of the most distinguishing characteristics of knowledge strategy – the discipline in which the knowledge strategist is employed – is that it is not a collection-based approach to KD/KS. Knowledge strategy – as a discipline – is a management-based approach to knowledge development and knowledge sharing. Going even further, another SMR colleague, Dale Stanley, says the information and knowledge strategy approach goes even beyond a management approach to KD/KS, to a cultural or organizational-effectiveness perspective about how to deal with knowledge.

So the knowledge strategist does not necessarily work with collections, although the work of those who do work with discrete disciplines informs the work of the knowledge strategist. And once we get to that level and start thinking about the management- or cultural- or effectiveness-approach to knowledge and knowledge value, we discover something about what corporate and organizational management needs.

While understanding the role and value of these discrete disciplines, what the enterprise really requires is qualified leadership and management staff to pull these – and other – disciplines together, to provide an enterprise-wide approach to knowledge strategy. In doing so, the knowledge strategists are then positioned to link the corporate knowledge strategy with the organizational business strategy, thus ensuring organizational effectiveness.

So in Mr. Guy’s future world of KM, knowledge services, and knowledge strategy, roles and responsibilities are going to vary according to the “class” or category in which the strategic knowledge professional works (one description referred to these roles as “above the line” and “below the line”). The work might be service-based (that is, providing a service that is knowledge-focused) or it might be a managerial or leadership role, perhaps departmental or having to do with one or more functional unit or, in an ideal situation, connecting to an enterprise-wide knowledge function or activity.

Do these knowledge “levels” merge at any point? Are there places, situations, environments where they’re all moving in the same direction?

Of course, and an obvious place to look is in the development of the corporate or organizational knowledge strategy. I’m often asked if a strategic knowledge practitioner creating a strategic plan (for a particular unit, like a specialized library) should include a section on knowledge services in the plan.

Indeed. Not only should it be part of the departmental plan, it should be part of the broader, overall, enterprise-wide knowledge strategy. This is a perfect opportunity for the strategic knowledge professional to work with enterprise management, as well as other employees – at all levels – working with KM and knowledge services anywhere in the company or organization.

That, to me, is what I see as the future of knowledge services, and it has a structure, one that’s been identified by my SLA and SMR colleague Dale Stanley.

The KM, knowledge services, knowledge strategy function requires knowledge thought leaders who can work in three related frameworks:

1. In the discipline of knowledge services (the theoretical, where the people working in the discipline deal with defining – and often teaching about – information management, KM, and strategic learning)
2. In the strategy area (that is, strategy development), with people who will be knowledgeable of the discipline and principles of modern KM and knowledge services and be able to turn knowledge services theory into strategies that are relevant to their organizations.
3. In application and implementation (that is, people who will possess skills in specific techniques and applications for implementing the strategies).

And with this last, we have also identified enabling skills, ways of working that are not necessarily inherent or exclusive to KM/KS but they are still, nevertheless, activities we consider “enablers” in helping organizations create and implement their strategies.

These are things like change management, the knowledge audit, measurement and metrics, content portfolio review, and other specific management tools and tactics that help support a knowledge services strategy in an organization.

### **Conclusion and Summary**

So here are a couple of concluding thoughts for you.

The focus now is enterprise-wide, and in fact that is the distinguishing characteristic of the “new” KM

It's all based on an expansion of our previously much-vaunted knowledge-sharing, but now what we earlier thought of as separate disciplines aren't separate at all. They're all part of a corporate knowledge strategy that simply says, “we don't care who you are or where you're located in the organization - we all share knowledge.”

So it's an “enlargement” – you might say – of what we've been trying to do for years, only this “new” knowledge services is part of corporate and organizational management and recognized for its role in leading to organizational effectiveness.

In my opinion and based on my findings and observations, this movement is characterized by the development of organizational and corporate knowledge strategy structured through knowledge services as the management methodology that makes it “practical.” As such, this new KM offers a dramatic and powerful paradigm for SLA's members and, again in my own opinion, a critical direction for us as we seek to embrace and implement the findings of the association's work in the SLA Alignment Project, as noted in President Anne Caputo's address at the Closing General Session of last year's conference in New Orleans.

From my perspective, and based on my observations as I move about the knowledge services community, the attributes of the new knowledge services are becoming clear.

Here's what I'm seeing as this new “slant” on knowledge services becomes part of our corporate and organizational management picture:

1. Knowledge services – the converging of information management, knowledge management, and strategic learning as a management methodology – is established or, if not established, is understood to be a goal of corporate or organizational leadership.
2. Knowledge services is linked to an enterprise-wide knowledge strategy, an organizational business strategy that, as Michael Zack noted, “takes into account the company's intellectual resources and capabilities.”
3. The various disciplines that support knowledge sharing – regardless of the specific role of the individual unit or function – are connected under one strategic knowledge “umbrella,” bringing together different perspectives that affect the organizational knowledge KD/KS process. Or, if not literally “connected” yet, the company is striving to make the connection, to ensure that all organizational knowledge is accessible, preferably via a single, user-friendly platform.
4. The company recognizes and follows the lead of its knowledge thought leaders, its knowledge strategists, people who play a significant role in integrating the knowledge-sharing function into the organization's day-to-day operations.

Some of this is not particularly new. Over the years, as I attempted to understand knowledge services as a professional discipline, it became clear to me that I was identifying an organizational “knowledge culture,” an environment or a milieu in which strategic knowledge professionals are responsible for ensuring that knowledge is shared in the workplace.

Indeed, this trend toward the development of the organizational knowledge culture has become so pervasive that at our company we built the concept into our corporate tagline: At SMR we work with clients in “building the knowledge culture.” For us, this movement toward a new way to thinking about KM and knowledge services is that important, and we want to live with it to such an extent that we incorporated our relationship with the knowledge culture into our work and the work we undertake for our clients.

So it’s a personal approach, this journey to the new knowledge services, but it’s not just that. My description of the new knowledge services builds, as I say, on observations (my own observations) of many different situations and in many different environments where knowledge sharing is built into and functions as an integral element of the corporate and organizational structure.

And here’s another “take” on the new knowledge services:

- It’s open and collaborative knowledge-sharing
- We go where the people are
- We reward participation
- We look for (and create) a richer profile
- We build on user experience (UX) – this is core
- Iterate, iterate, iterate
- It’s not about tools – it’s not about documents – it’s about KD/KS –knowledge development and knowledge sharing.
- And finally, it’s functions in a culture in which the strategic knowledge professional and the knowledge strategy work as advocates for the users.

And how do specialist librarians and information professionals transition to knowledge strategy? We look at what’s going on in the organizations where we work, and following Peter Drucker’s admonition that to be successful managers we must be both *opportunity*-focused and *results*-focused, we look for opportunities in the workplace to be the company’s knowledge thought leaders.

We also think hard about our education, about the formal training we’ve received to enable us to do what we must do. We take courses, such as those offered in the private strategic learning and training sector (and like those taught by our company, both for organizations like SLA and with internal training for corporate clients).

And we sign on for new formal learning, such as the Master’s Degree in Information and Knowledge Strategy, now being rolled out at Columbia University in New York (full disclosure: I’ve been involved in the development of this program, and I’ll be teaching in it).

### **Your Role and Your Expectations**

So that’s where I think we’re going and what we’re going to need to do to get them.

And now that you’ve heard what I think the future of KM, knowledge services, and knowledge strategy is going to be, what do you want your role to be in this profession?

Do you want to be part of the new knowledge services?

Do you want to be a knowledge worker? Well, you’re already too highly qualified for that, but you can continue what you’re doing as a specialist librarian/information professional and transition yourself to working as a strategic knowledge professional

Or you could move yourself further along the career track and get yourself prepared to be a knowledge strategist. That’s what we’re hearing companies and organizations asking for, so my question to you is just this: do you want to be one? Do you want to work with your employing organization to have an impact on how knowledge strategy is developed and implemented and matched against the company’s business strategy for business success?

If that's the case, we might get back to that ambition *thing* I spoke about earlier. You might want to ask yourself some questions like:

"Why am I working?" "What is **my** ambition?" "What do I want my company or my organization to be, as a knowledge culture? How I can help get it there?"

And – as important as anything else we're discussing here today – "What will be **my role** in that future?"

To answer those questions, let's think about what some other people are saying:

- David Brooks in *The Social Animal*: the Greek desire for recognition and union (thumos) – goes beyond the other drives for money and success
- James Gleick in *The Information: A History, a Theory, a Flood*: information and knowledge strategic learning are the prime mover and universal substance of humanity – but we must have people who can "lead the meaning." Is that something you want to do, "lead the meaning"?
- And even our always reliable Peter Drucker had advice for us, in his book *Management: Tasks, Responsibilities, Practices*, in which he put forward that, as managers, we have two management responsibilities: to achieve organizational effectiveness – of course – and to contribute to the common good, to make life better for all of humanity.

Those are tall orders, it seems to me, to be motivated by a desire for recognition and union, to "lead the meaning," and to be successful not only in helping our employing organizations succeed but in contributing to the common good. And they all come together in this new "version" of knowledge services we're talking about, in a workplace environment and culture where managing knowledge and delivering knowledge services leads to the organization's success.

Thank you.

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