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Building the Knowledge Culture

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STARTING KM IN YOUR ORGANIZATION:

HERE'S YOUR STRATEGIC ROAD MAP

In early 2011, a LinkedIn member posted a query for the KM Edge Group: *If you were given the task of starting KM in your organization, how would you begin?*

It's almost an ideal scenario for knowledge workers. Just imagine, being asked what we want to do, to move KM forward in our organization.

At SMR, we decided to respond to the query and published the following series of posts during March and April 2011.

- Guy St. Clair

First Step: Define what you want to do. I'm not sure we are talking about knowledge management (KM) here. Although that's the accepted term in many organizations, what we're really putting in place is *knowledge services*, the management methodology that converges information management, knowledge management, and strategic learning. All three are going to have to be in place to "start" KM in an organization.

That said, the first question to ask is clear and simple: what do you want to do?

Are you seeking to provide a tool or technique so people can find what they are looking for easier, faster, and with fewer mouse clicks? Have you been approached, for example, to build a database that people can use (if they know how to find it) to access company reports, sales data, or some other specific type of information or knowledge?

Or, on the other hand, are you seeking to work across all the company's functional units, to set up some sort of enterprise-wide knowledge-capture and knowledge-sharing framework, with all organizational affiliates tapping into this resource?

What's the genesis of the task? Be sure that you (and everyone who will be working with you) share the same ideas and goals for what you expect to achieve as you speak about "starting" KM in the company. Just (excuse the cliché) be sure you and they are on the same page.

Some of the examples I've mentioned might focus on this or that department of the organization, which is fine (and you can do bits and pieces of KM/knowledge services within a single functional unit, or a group of units). But how will developing them contribute to the larger, enterprise-wide knowledge picture? How will they cut across those infamous "silos" we hear so much about? If you're looking at developing an individual KM tool or process for a single functional unit, your focus will be different than if you are working enterprise-wide.

And if you are going enterprise-wide, there's another question to be asked: what kind of organization are you working with? Is there a knowledge culture? If there is, good, because then you can give your attention to strengthening what's already in place. [And if there isn't a knowledge culture, brace yourself – you've got some work to do!]

Second Stop: Define Your Terms. When you're looking to bring KM into the company, it's critically important that everyone use the same language. You and your colleagues must understand the terms in the same way.

So before you get too far along, give some attention to what you're talking about. For example, what is your role in the company? You probably already have a title, and are part of a functional unit or department, but *what do you do?* How do you think about yourself in your work?

I like to suggest that knowledge services managers think of themselves as *knowledge thought leaders*. Basically, a knowledge thought leader is one of those people who "get it" when it comes to working with KM, knowledge services, and knowledge strategy development. If you've been given the assignment to start KM in your organization, that's you.

As the company's knowledge thought leader (or one of them), what do you mean when you talk about "KM"? There are probably as many definitions for KM as there are people trying to define the term. For me, the easiest way to think about KM is what I just said above, using the definition put forward by Larry Prusak and Tom Davenport a few years ago: KM is "working with knowledge." If you're looking to start KM in your organization, you're looking to figure out how people can work with the company's knowledge (work better and smarter), or with new knowledge being created.

Our next step is to define *knowledge services*, the broader, more-inclusive methodology for managing knowledge through excellence in information management, knowledge management, and strategic learning. Because it goes *beyond* KM, knowledge services seems to be the right combination for what we're trying to get started in the company. When we combine these three elements, matching information management, KM, and strategic learning, we're on our way to creating a knowledge-sharing environment that works for everyone. And if it makes it a little easier, think of knowledge services as our technique for putting KM to work, the practical side, you might say, of KM. Why? Because it's the practical side that is going to get KM moving in the workplace, if we're going to be successful.

Third Stop: Don't Go It Alone. The whole point of knowledge services is knowledge development and knowledge sharing (what we like to call "KD/KS"). So as we think about starting a KM initiative for the organization, let's practice what we preach: Shouldn't we share this experience? Shouldn't someone else be involved?

"Why anyone else?" you ask. "I've been tasked to start KM and it's my responsibility."

Of course.

And if it is going to be your responsibility (and if you're going to be accountable as well, which you are), bring others along with you. Share your start-up experience with others and you'll all benefit.

How do you determine who will be part of this knowledge services initiative?

Here's the place to start: SMR colleagues Dale Stanley and Cindy Hill and I have one on-going conviction that drives our work: "Get sponsorship."

There's no question you can do it. After all, your managers have placed their trust in you, and they have their own expectations of what success will look like. So why not bring one or two of them into the process with you? Go to one (or more, if you prefer) of the company's leaders and explain what you want to do. Then invite them – as Dale puts it – to express, model, and reinforce their commitment to bringing forward this knowledge services initiative.

They'll *express* their support by talking about it publicly and with leaders in different parts of the company. They'll *model* their commitment by figuring out how to apply your knowledge services solution (under your guidance of course) to work in their immediate office or sphere of influence. Finally, they will *reinforce* their sponsorship by making sure others in the organization – particularly their direct reports – understand, respond to, and participate in what you're doing.

And there's more. Once you've signed up your sponsor(s) and have their names to mention as you speak about the new knowledge services initiative, find advocates and champions as well. These are people who will talk about what you're doing, tell others about it, and even – if they are so inclined (or invited) – direct others to speak with you about your project and perhaps even participate in its development.

Look for experience. Identify other knowledge thought leaders in the organization who have played leadership roles in making some difference at the company. These might be people who have done some work in the knowledge domain (building a new records-management system, for example, or managing the development of an enterprise-wide solution like SharePoint or other product). Or what they did might not be related to KD/KS at all (leading a departmental re-structuring, for example, or working with a task force to accomplish a particular task). The point is, they know how to get things done and they can share their experience with you.

As you work with them, some of these people will evolve into internal consultants for your project, which leads to the next group of people who can work with you. These internal consultants – who essentially become your community of practice for what you’re doing – will be critical to your success even if, as I mentioned, their expertise is not especially in the knowledge domain.

You will also – depending on the size of the project and support available for its implementation – want to think about meeting with some external consultants (full disclosure: this post comes from a management consulting firm specializing in knowledge services and knowledge strategy development). Don’t be shy about asking for a conversation with consultants. Even if they don’t specialize in your particular subject or the direction you’re seeking to move with your proposed initiative, most consultants are happy to spend some time helping you work through your thoughts or even, depending on circumstances, helping you develop your terms of reference for the project.

In any case, whatever direction you take in approaching your assignment to move forward with a knowledge services initiative, don’t think you have to do it by yourself. There are plenty of people who are willing to help you put KM to work in your organization. Find them and use them.

Fourth Stop: Think Big and Lead the Change. In our industry/profession, we make a lot of jokes about how those of us involved in knowledge management, knowledge services, and knowledge strategy development are trying to “change the world.”

I submit that what we’re doing is indeed important, and while it’s fun to be a little light-hearted about our work, strategic knowledge professionals and knowledge strategists really are part of a critical undertaking happening in society (both globally and in our home countries). Our role – as knowledge thought leaders – is possibly as important (and as influential) as any other group of people in society today.

[Case in point: take a look at Geoffrey Nunberg's review of *The Information: A History. A Theory. A Flood.* By James Gleick in *The New York Times Book Review*, Sunday, March 20, 2011. As you get to the end of the essay, it's pretty clear what our job is. Knowledge thought leaders lead people to those "lines of meaning" Gleick writes about.]

So if you’ve been tasked to start a KM/knowledge services initiative for your company, you must first examine the organization as a knowledge culture. Start with some very basic questions:

Is there a knowledge culture in place? Are there shared beliefs and values about the role of knowledge in the company’s achievement of its corporate mission? Do knowledge-related activities focus on the larger organization, or are they limited to this or that particular department or functional unit? Is the company a place where collaboration is a given?

If you’ve been tasked to start this knowledge initiative, the answers to these questions are probably negative. Even so, think about them anyway. You’ll need that background as you begin to bring others into your work. And you need those answers as you try to figure out the environment where your knowledge services initiative will flourish.

Which leads to your next task: Regardless of whether you are building a “new” knowledge culture or strengthening a knowledge culture already in place, prepare to lead the change. Dealing with KM requires cultural change, and one of your most significant contributions will be to make sure the change management process succeeds.

How to do it? There are many, many experts in change management, and there is much good advice on the subject (some of it has been around for a long time, so be careful that any tips you pick up match current thinking about knowledge services and KM).

For your purposes, as you seek to move into your initiative, these critical steps have been put together by the SMR team:

1. Define the change
2. Find your sponsor (see the previous “stop” on this “road)
3. Create alliances and identify change agents

And whatever you do, be wary of quick fixes and reactive responses – what you’re taking on is not just about the tools.

If you want to learn more about change management and the knowledge culture, take a look at [Knowledge Services and Change Management: Building the Knowledge Culture](#).

Fifth Stop: *Identify What’s Been Done Already.* Now you’ve spent a little time exploring the organization as a knowledge culture (remember the definition: a knowledge culture is an environment with shared beliefs and values about the role of knowledge in the company’s achievement of its corporate mission).

As you’ve looked around, you’ve found some folks doing what you could define as KM work or taking some approach to knowledge services, although they might call it something else. With each of these, these knowledge workers have the goal of making information, knowledge, and strategic learning just a little easier to work with, providing some tool or techniques (or even just setting up an ambiance) that will enable their colleagues to work smarter and more efficiently through knowledge sharing.

What are some of these activities? Has someone created a more efficient way for people to get to regularly needed documents? Has a management team figured out a way to harmonize substantive planning and reporting formats so that each time a report is required the affected knowledge workers don’t have to “re-invent the wheel”? Has there been an enterprise-wide mega-effort, such as the development of a new tool for managing all financial reporting and analysis? Or even the re-development of the corporate intranet?

Whatever you’re looking at (and obviously for KM/knowledge services activities that were successful), give some attention to the ideas we’ve put forward so far in these posts: who were the knowledge thought leaders in this activity (although, since you’re the employee heading the *new* knowledge services initiative, these people are probably not thought of as “knowledge thought leaders”)? What first steps did they take, and who did they call in to work with them? Who sponsored the activity? What was the scope of the activity (enterprise-wide or relating to one department or functional unit)? How big was it? What resources were required? Who signed off on resource allocation for the project (meaning, who *approved* it and *permitted* it to move forward)?

And quite frankly, if you’ve uncovered some attempts at knowledge services development that did not work, take a look at these as well. Why didn’t they work? Was it a communications issue? Was it, as was noted in response to an earlier post, a lack of interest at the middle management level? Or fear of this-or-that role or activity being “taken away”? Was it a change management issue, in which the players were not prepared sufficiently for making the change?

Look around at some of the knowledge services models already in place and identify how you can apply the steps in their development to building a new KM/knowledge services initiative. You’ll find that some good work has been done, and you want to match it if you can.

Sixth Stop: *Identify resources.* By now, we’ve all learned that the fundamental planning tool is resource allocation. So an early question to management asks what resources are available for the initiative you’ve been tasked to develop. In project management, activities cannot be scheduled unless they can be matched against available resources (or – at the very least – against estimated resources).

In most planning situations, project resources are not limited to financial support, although most of us seem to focus there first. Time and labor are equally important, and for you to proceed with your task, thought must be given to not only how much time is available from staff (or external temporary knowledge workers) but to the scope of the initiative as well – that is, how “big” is the task and what is the time frame for getting to the endpoint. Of course both labor requirements and project scope impact decisions about financial resources, so in the long run

all three planning elements (personnel costs, project scope, and finances) will come into the picture as you plan your KM start-up initiative.

As you (and your team, if others are working with you) begin to think about how you'll move forward, brainstorm with other knowledge workers about what "pieces" will be required to reach your goal:

1. State the established goal or objective. (Don't make this too big – this isn't "strategic planning" – that comes later).
2. Review personnel available to work on the initiative, including both internal staff available to work with you and any external contractors, consultants, or temporary workers you might require. If you're unsure about whether you have the internal staff to fit the initiative into the current workflow, include a "placeholder" to remind you that additional staff might be required.
3. Unless there is a specific deadline established by management, try to "spec out" how much time the project might be expected to take. If the overall scope of the project has not been established, again provide an estimate, and be prepared to pull back or expand your estimate as you have more information. Don't fall victim to "we'll get around to it" or offer some vague time schedule that doesn't realistically take into account what is required. Be as specific as you can with the information you have.
4. When you have collected this information, share it with management so you can come to decisions about scope, time, and financial resources required. You and your managers have to agree on what you'll be working with before you can move forward with starting your KM/knowledge services initiative.

Seventh Step: Conduct the Knowledge Audit. We choose the term "audit" for lots of reasons, and primarily because we require something more than a "needs assessment," the usual terminology used in many similar situations. In the knowledge audit, we're making a judgment about knowledge services, determining *how well* we are doing what we're doing now and then identifying needs and making recommendations for working better, for smarter KD/KS.

As we move into the knowledge audit, we expect to examine and study three critical "big picture" elements:

1. Organizational structure
2. KM/knowledge services in the organization and perceptions and expectations re: service delivery
3. Marketing, awareness-building, identification of advocates, champions, and sponsors

We begin with a premise developed in our work several years ago (using Sue Henczel's phraseology, which we came up during our work together in projects we conducted throughout Australia and New Zealand). This premise asserts that the successful management of knowledge services depends on understanding:

- How the external environment influences internal processes and procedures
- How well KM/knowledge services processes align with and support strategic goals and objectives of the organization
- Knowledge "flow" within the organization
- How change is handled in the organization.

Looking at the details of these over-arching goals is a good first step toward a successful knowledge audit, and incorporating them into our knowledge audit framework will give us the information we need to move forward with the knowledge services initiative in the organization.

Eighth Step: Develop a Corporate Knowledge Strategy. However you interpret your assignment, recognize that developing strategy is fundamental. You have to know where you are going, and giving some thought to the organization's knowledge strategy will not only get you on your way, you'll begin to frame your goals with the practicalities of how you are going to attain those goals.

A corporate knowledge strategy is in two parts. The first – what we usually call "knowledge strategy" – is very inspirational and aspirational, a vision of how we want to work with knowledge in the organization.

One way of looking at knowledge strategy development is to think of knowledge strategy as a way of thinking, not a checklist or a procedural exercise or a set of frameworks. That's strategic planning (which as I've noted we'll

discuss in the next post). A knowledge strategy is a picture of how knowledge development and knowledge sharing – our famous KD/KS – will “look” when our start-up knowledge services operation is up and running.

As I say often (in my business I work a lot with knowledge strategy development), developing a corporate knowledge strategy is very rewarding, mainly because it gives you the chance to drill deeper than most people get to do in their work. Not only does it force you (and your colleagues) to talk about strategic knowledge, you get to identify how people work with knowledge, talk with them about their KD/KS requirements, and work with them to come up with solutions for doing KD/KS better.

It’s also a little scary because it’s “big picture” stuff, and you have to work with organizational leaders, managers who will help you confirm that knowledge services and a corporate knowledge strategy are important for the company’s success. When they come into your knowledge strategy development picture (as they will, because they’re the corporate folks you’ll talk to first), your best approach is to capture their attention by linking knowledge strategy to the company’s business strategy. One useful approach is the one Michael Zack came up with some time back: defining and speaking about the organization’s knowledge strategy as *a business strategy*, a strategy that takes into account the company’s intellectual resources and capabilities.

In my opinion you can’t go wrong with this, mainly because just about everyone in the company is dealing with “intellectual resources and capabilities” in one way or another. Take a look at a few of these and figure out which one (or which ones) you want to tackle for your first KM/knowledge services project.

Ninth Stop: Strategic Planning. For some knowledge workers, there is a tendency to think of knowledge strategy as something like a checklist, a collection of tasks to be accomplished or a set of applications to be incorporated into the larger corporate KM/knowledge services structure.

Not really. The strategy – as noted above – is an inspirational statement, a document that describes the hopes of the company’s stakeholders working with knowledge development and knowledge strategy.

Once we’ve defined what we’re hoping to achieve with organizational knowledge, it’s now time to move on to the “checklist” (we might call it). That’s the strategic plan, the steps we will take to ensure that the organization’s knowledge goals match its operational goals.

For some, it’s often a matter of semantics, with “knowledge strategy” being used to describe both elements of the task. That’s all right, if that’s what works in your organization. The point is simply to be sure that we get both the aspirational/visionary “piece” and the specific planning direction into the picture.

A logical next step is to recognize the established connection between strategic planning and the management of strategic issues. And what are these? The answer is simple, and very broad-based: anything in the KD/KS context that causes concern or impacts organizational performance or effectiveness. From my perspective, I think of strategic issues as those things the company must get right (or, as one colleague remarked, “what keeps managers up at night”).

Here’s my list:

- Organizational structure
- Financial planning/management
- Information management and information technology
- KM/knowledge services management and delivery
- Infrastructure planning/future services

These are all issues for which a solid, well-thought-out knowledge strategy can provide critical support. For each item on this list, try to identify required knowledge-related activities. For example, with organizational structure, ask if there is ownership for knowledge services (*i.e.*, who is responsible for, say, the company’s intranet? what department has authority *and* accountability for how well the intranet is handled?). For infrastructure planning/future services, ask if the company has completed an environmental scan to establish future goals (*i.e.*, what does the company expect to accomplish over the next two or three years?).

Once you complete these steps (especially if you're brainstorming with colleagues along the way), you'll soon begin to identify individual tasks that must be taken. Put them into some sort of order, and you're on your way with your strategic plan.

Tenth Stop: Set Up Your Metrics. Keep in mind that your KM initiative won't amount to much if you and your team can't describe your progress. Milestones for monitoring and measuring success along the way will have to be in place, and there are any number of management resources that can be brought into play.

One place to begin is to ask, "What factors influence success in this company?" In [Critical Success Factors: Management Metrics, Return-on-Investment, and Effectiveness Measures for Knowledge Services](#), Dale Stanley and I came up with these:

1. Is the acquisition of selected management tools for information, knowledge, and strategic learning cost-effective?
2. Are the costs of maintaining these knowledge assets higher than the benefits?
3. How well are knowledge assets supporting strengthened decision making, accelerated innovation, and improved research in the company?
4. Does the structure for managing intellectual capital match the corporate function? (For example, is there a need for a stand-alone functional unit devoted to providing and/or managing one or another of the several types of research assets required by the larger enterprise? Or should assets be managed in relation to the functions they support?)

Finally, as you think about how (and what) you'll measure, ask these questions:

1. Who will be receiving the information and making judgments based on the metrics?
2. What do those people want (or need) to know?
3. How will the metrics be used? Are decisions based on these metrics?

Give serious thought to how you will measure KM, knowledge services, and the connection between the company's knowledge strategy and its overall effectiveness. Don't get weighed down with so many details that you lose track of what you're measuring, and be sure that you speak with others who understand what you're doing and can help you establish milestones.

Above all, be flexible. None of what you're doing is "carved in stone" and more than anything else, you want to set up a knowledge development and knowledge sharing (KD/KS) framework. If you're measuring what you're doing, your KM start-up is on its way to success.

Implementing Your Start-Up KM Initiative: *Journey's End?* NO WAY!

Is that emphatic enough to make my point?

The question we're exploring is this: ***If you were given the task of starting KM in your organization, how would you begin?***

We've been developing a strategic road map for the project, and so far we've come up with ten basic steps:

1. Define what you want to do
2. Define your terms
3. Don't go it alone
4. Think big – and lead the change
5. Identify what's been done already
6. Identify resources
7. Develop a corporate knowledge strategy
8. Develop your strategic plan
9. Conduct the knowledge audit
10. Establish measures and metrics

Now we emphasize that having given thought and study to these ten “stops” on your strategic road map – and taken actions – we keep going. We don’t put our strategic road map down (in fact, some knowledge strategists like to take a list of this kind and post it, so it can be referred to on an on-going basis).

Having come up with our strategic road map – the overall plan – we keep referring to it and sharing our ideas with anyone who will listen. Our responsibility now is to ensure that all the topics we’ve thought about are ingrained (that’s not too strong a word) into everyone’s thinking. Throughout the workplace, it’s our job now to ensure that the changes take place and that the KM initiative leads to the corporate knowledge culture we’ve got to have for our organization’s success.

So keep in mind that – as important as anything that has been stated here – your KM start-up is only the beginning. Once you have a good example in place, once you have a solid team prepared (and inspired) to work with keeping the good work going, and once you have senior management committed to an enterprise-wide knowledge culture, your work is just beginning. As has been made clear (I hope!), everyone in every part of the company needs to manage knowledge, and there are many, many opportunities for bringing KM and knowledge services forward in the organization.

If it helps, go back to our early great mentor, the late Peter F. Drucker.

Often called “the father of modern management,” Drucker’s work impresses me even more as I move deeper into KM, knowledge services, and knowledge strategy. Indeed, from my perspective, I like to think of Drucker as not only the father of modern management but as the “father of knowledge services.” It’s my personal opinion, of course, but I go this way because it was Drucker (so I’ve heard – I can’t find a citation) who articulated that the successful manager has two critical attributes: *opportunity* focus and *results* focus.

Thank you, Mr. Drucker. The same is exactly true for the successful knowledge strategist: if we can identify (and take advantage of) opportunities for strengthening KD/KS in the company, and if we can establish and clearly describe mission-specific results, our knowledge services initiatives will succeed, supporting the company as a knowledge culture.

Good luck.

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