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Building the Knowledge Culture

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THE NEW KNOWLEDGE SERVICES: NEXT STEPS FOR CAREER PROFESSIONALS SPECIALIST LIBRARIANS AS KNOWLEDGE STRATEGISTS

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[Presented at the Special Libraries Association Annual Conference, Chicago IL USA July 16, 2012 in a "Spotlight Session" sponsored by SLA's Information Technology and Knowledge Management Divisions]

QUICK TAKES:

- Knowledge strategy is the emerging management discipline. Companies and organizations are required to deal with massive challenges in working with collected and developing information and knowledge.
- Regulatory and record-keeping requirements, e-discovery, and many other (sometimes overwhelming) issues for managing the company's intellectual capital now compel enterprise leaders to have qualified strategists on staff to develop and implement the corporate "road-map" for success with knowledge management (KM) and knowledge services (information management, KM, and strategic learning).
- With a well-designed, enterprise-wide knowledge strategy, management insures success with the knowledge development/knowledge sharing (KD/KS) process, allowing the company to align its knowledge strategy with its business strategy.
- The influences for the successful management of the corporate domain include the work of authors and scholars of the past (H.G. Wells, Marshall McLuhan, Peter Drucker) and of the present (James Gleick). Their work provides background and guidance for modern knowledge strategists, who must engage all organizational units (since all units develop and share knowledge) and provide leadership for managing the company's intellectual capital. Despite the presence of discreet functional disciplines connected with the individual elements of the KD/KS process, the company requires a single, overarching knowledge strategy to achieve organizational effectiveness.
- Specialist librarians have a unique understanding of organizational needs with respect to the management of knowledge services. They are the information professionals best qualified to take on the role of corporate knowledge strategist because their professional allegiance is to the organization that employs them. It is not to any social group, any philosophical belief, any societal framework, or any profession.
- At the same time, specialist librarians understand the management and leadership requirements for operational success within the company or organization, as demonstrated by their work with enterprise-wide research- and knowledge-related functions. In their work, specialist librarians put into practice leadership and management principles identified and put forward by such contemporary management leaders as Tony Saadat of Soutron Global, Dr. Lee Igel of New York University, and Dale Stanley of SMR, leaders whose concepts about management and leadership – along with those of other management thought leaders – are described in the presentation.

KEY WORDS: Knowledge Management, KM, Knowledge Services, Knowledge Strategy, Special Libraries Association, SLA, Specialist Librarians, Information Professionals, Knowledge Strategists, Organizational Development, Organizational Effectiveness

Today's topic is Knowledge Strategy and the work of the knowledge strategist. It is my opinion that those who work as specialist librarians, who make up the membership of this important professional organization and who play distinctive and critical roles in our employing organizations, these people are the single group of information professionals best qualified to be knowledge strategists.

Please don't get me wrong. Knowledge strategists – knowledge thought leaders in their employing organizations – come from a wide variety of backgrounds having to do with the management of

information, knowledge, and strategic learning (the three components of knowledge services). I've come to know many of them and – truth to tell – very few of them come from specialized librarianship (although some do). It is my contention that it is the specialist librarians who are cut out to be the knowledge thought leaders in the companies where they work.

Why do I say this? Because (and I think you know this) I know the field of specialized librarianship.

I've been a member of SLA for a long time – going back to 1972. I've served in many voluntary positions in SLA (forty years is a long time!), and I've served at almost every level of volunteer activity, up to and including my presidency of SLA and my term of service on SLA's Board of Directors.

And – having spent ten years researching and writing the centennial history of SLA¹ – I think I can safely say that I know something about the history of specialized librarianship, as a profession and as a discipline in and of itself.

If you read that history, you know that in the last two chapters and the epilogue, I made my predictions about how specialist librarians, being different, can achieve new heights in their employing organizations. I made these predictions because in this branch of librarianship, we are different, different, in fact from all other librarians and information specialists.

We are different for one simple reason: our professional commitment, our diligence in our work, indeed, our very professional allegiance is to the organization that employs us. It is not to any social group, any philosophical belief, or any societal framework. It is not, in fact, to any profession. Our allegiance is to the company that has employed us to bring our professional skills to its workplace.

Think about it....

Your job exists and you are in that job because you are employed by your parent organization to see that the knowledge development and knowledge sharing function – the very foundation of KM, knowledge services, and knowledge strategy – is performed in your company as well as it can be performed. As the specialist librarian – or whatever job title has been assigned to the work you do – it is your responsibility to ensure that knowledge development and knowledge sharing – that exalted function to which we attach the acronym “KD/KS” – is supported and performed to the highest standards of service delivery you can provide.

So you are already primed for the role of knowledge strategist, and I want today to share with you Mr. Guy's ideas about how you can move forward more formally – if you wish to do so – as the knowledge thought leader for your company. I want to speak with you – unabashedly – about knowledge strategy.

In today's workplace, knowledge strategy is the emerging management discipline. And it is a management methodology that enterprise leaders are asking us to provide.

I'm not going to be coy or shy about the real point of this presentation: I want to tell you how I think you should restructure your career and in doing so, enhance your relevance in the organization where you are employed. I want to use the phraseology that my colleagues at Columbia University and I have developed to describe this new management methodology – “information and knowledge strategy” – and I want you to leave this Spotlight Session with information that – if you agree with me – can help you take your work as a specialist librarian/information professional to a new level.

You can do it if you want to, and as I say, if you want to move in this direction, you are – in my opinion – the single, most qualified people I know to be your organization's knowledge strategists.

Simply put, we have learned through many studies, discussions with enterprise leaders and corporate managers, and, indeed, through an in-depth review of the SLA Alignment Study, that there is a single

¹ St. Clair, Guy. *SLA at 100: From “Putting Knowledge to Work”® to Building the Knowledge Culture: The Special Libraries Association 1909-2009* (Alexandria VA: Special Libraries Association, 2009)

“driver” – you might call it – for organizational effectiveness. That driver is the alignment of the company’s information and knowledge strategy with the corporate business strategy.

You know – as we all know – that companies and organizations are dealing with massive challenges when it comes to working with their collected and developing information and knowledge. Enterprise leadership doesn’t know how to handle big data, regulatory and record-keeping requirements, e-discovery, and all the other (sometimes overwhelming) issues related to the organization’s knowledge domain.

They need a strategy, and when they have a working, functioning knowledge strategy, when the company’s knowledge strategy aligns with its business strategy, the company is positioned to succeed in achieving whatever mission or objective it has put forward for itself and its affiliated stakeholders. Aligning those strategies is, in my opinion, what you can do as the company’s knowledge strategist. Knowledge strategy can be your unique calling.

You’re not surprised, I’m sure, to be told that knowledge strategy moves from and is informed by knowledge management (KM). When the organization has successful KD/KS in place, the match between the company’s intellectual capital and the corporate mission is assured. And, as a knowledge culture, that match – that alignment – includes knowledge services (what we call the convergence of information management, KM, and strategic learning) as well as the organization’s knowledge strategy, which Michael Zack has identified as the organization’s business strategy that takes into account its intellectual resources and capabilities.²

It’s all of a piece, isn’t it? And it fits right together with what our great Peter Drucker, the father of modern management, meant when he referred to the company’s knowledge workers not as a cost to the company, but as an asset.

Here’s what Drucker wrote:

Knowledge workers own the means of production. It – this means of production – is the knowledge between their ears. And it is a totally portable and enormous capital asset. Because knowledge workers own their means of production, they are mobile. ...

Management’s duty is to preserve the assets of the institution in its care. What does this mean when the knowledge of the individual knowledge worker becomes an asset and, in more and more cases, the main asset of an institution? What does this mean for personnel policy? What is needed to attract and to hold the highest-producing knowledge workers? What is needed to increase their productivity?³

You – as the company’s knowledge strategist – are well in command of the answers to those questions. You understand management and leadership in the company because as a specialist librarian you have learned to work within the organization’s management and leadership framework to get your work done. It’s your job. It’s what you do. As the company’s specialist librarian, you understand how management and leadership impact the opportunities and the results expected of the company’s knowledge domain.

And here’s something to help us put things in perspective:

Most of you, by now, are familiar with James Gleick’s *The Information: A History, A Theory, A Flood* – probably the most important book relating to our work ever published⁴. As the organization’s knowledge strategist, we specialist librarians are in the unique position of being able to take a step back and look at what we contribute to the organizations where we are employed.

² Zack, Michael. "[Developing a Knowledge Strategy](#)", *California Management Review*, Vol. 41, No. 3, Spring, 1999.

³ Drucker, Peter F. *Management Challenges for the 21st Century*. New York: Harper Business, 1999.

⁴ Gleick, James, *The Information: A History, A Theory, A Flood*. New York: Pantheon Books, 2011.

In fact, we can look 'way back. Hear what Marshall McLuhan had to say – back in 1962 – about what we were coming to (and now – for us – where we've come). Gleick quotes McLuhan:

We are today as far into the electric age as the Elizabethans had advanced into the typographical and mechanical age. And we are experiencing the same confusions and indecisions which they had felt when living simultaneously in two contrasted forms of society and experience.⁵

But Gleick doesn't stop with McLuhan. He goes back further, much further, to H.G. Wells' *World Brain*, published in 1938. "There was nothing fanciful about what [Wells] wanted to promote," Gleick writes:

[He wanted] an improved educational system throughout the whole "body" of humanity. ... "We want a widespread world intelligence conscious of itself."⁶

There's more.

Representing England at the 1937 World Congress of Universal Documentation, Wells foresaw – as Gleick puts it – a "sort of cerebrum for humanity, a cerebral cortex which will constitute a memory and a perception of current reality for the whole human race."

Gleick describes Wells' goal:

[Wells] was imagining something mundane as well as utopian: an encyclopedia. It would be a successor to the great national encyclopedias ... This new world encyclopedia would transcend the static form of a book ... It would be in a state of constant change – a sort of mental clearinghouse for the mind, a depot where knowledge and ideas are received, sorted, summarized, digested, clarified, and compared.

And then Gleick asks the question that resonates with each of us as knowledge strategists: "Who knows whether Wells would recognize his vision in *Wikipedia*?"

So we move from the then to now, because now we understand where we've come. We recognize that there is now an opportunity, an opportunity for us that is probably as great as any that has been presented to specialist librarians since the very beginning of our profession.

Enterprise leadership needs us. And needs us now. Organizational management is giving attention to the financial and mission-related value of knowledge services in the larger organization as it has never done before.

There is an amazing, unprecedented sea change taking place in the workplace and we are poised to lead that change – for our employing organizations, for ourselves as knowledge leaders, indeed, I would submit, for society at large. The world needs knowledge strategists, and we are the people best qualified to be knowledge strategists.

As it happens – and it's why we specialist librarians are so lucky – the work of the knowledge strategist often evolves from a role as an information professional. That employee – kept busy providing information products, services, and consultations – is recognized in the company as the "go-to" person for knowledge services delivery, regardless of how the operational business unit where he or she works is designated, or the individual job title, educational qualifications, the employee's experience, or his or her expertise.

There are several specific steps the specialist librarian should undertake if he or she is interested in moving into organizational knowledge strategy. One of the first is to develop skills for matching

⁵ McLuhan, Marshall, *The Gutenberg Galaxy* (Toronto: University of Toronto Press, 1962), quoted in Gleick.

⁶ Wells, H.G. *World Brain* (London: Methuen, 1938), quoted in Gleick.

knowledge strategy theory with practical experience – that expertise we specialist librarians have in spades – and then we match that expertise with what’s needed in the specific workplace.

At the same time, we make connections. We train ourselves to be very sophisticated about the clients who work with us in our position as specialist librarian. If there is a project or research undertaking in which we and our staffs have been particularly valuable to the success of the project, we make sure that the project’s leaders are aware of our commitment to their project and to our contribution to their success. That’s just plain old “Marketing 101,” but by drilling down into how we’ve worked with that project team and figuring out how those knowledge workers – and others who are connected with them – understand how we are part of their team, we take the basics of marketing and awareness-raising to a new level – to our and to the organization’s benefit.

Then there’s our work with sponsors. Dale Stanley and the SMR team talk about this all the time, both with clients in our consultancies and with participants in the SMR workshops. Understanding who is in charge and then enabling that person to join with us in support of what we’re doing as knowledge strategists is a critical component in the knowledge thought leader’s work.

Not only must we have a comfortable relationship with the people in the company who are the company’s change agents, knowledge advocates, and thought leaders in their own line of work, we have to bring enterprise leaders into our work as knowledge sponsors, often by simply inviting them to engage in – both as participants and as beneficiaries of knowledge initiatives. Dale’s catch-phrase for this connection is that we’re inviting these senior managers to “express, model, and reinforce” their enthusiasm and their participation for knowledge-related corporate activities.

The best example of this? A recent project in which a company’s Senior VP for Corporate Affairs expressed interest in the enterprise-wide knowledge strategy project our team was developing for the company. She often called me in, just to talk about information and knowledge strategy as a corporate management element, and once I picked up on her particular interest – primarily from a theoretical and intellectual perspective – my team was able to identify a particular knowledge-sharing need on her “side of the house.” We spoke to her about it, identified what the work would involve and what the benefits would be to her and to her staff, and she was totally on board. Not only was she excited and pleased to have a specific strategic knowledge initiative for helping her people work better and smarter, she expressed her enthusiasm by speaking openly about the need for the project and its success. The initiative became a model for other units of the organization, enabling this senior manager to use her authority to express her support by inviting other units of the organization to determine how they could benefit from a similar initiative. And best of all, she reinforced her support for the initiative by making it clear that she expected other managers to follow her example in supporting the recommendations of the knowledge strategy being developed for the company.

And talking about the role of sponsors brings up another important element in our transition to knowledge strategist: the importance of looking around the organization and learning to identify and interact with the people who are in a position to influence the work we and our staffs do. Why is this important? Because you’re looking for that proverbial “seat at the table” when corporate management decisions are made. If you’re going to succeed as a knowledge strategist, you must use your professional skills, education, and expertise to ensure that the growth of the organization as a knowledge culture moves forward, and you can’t do that unless you are part of the decision-making process.

And for those of you in the audience squirming at the idea of putting yourself forward in such an influential role, let’s bring out the big guns.

I was fortunate to be in the audience when President Obama gave the commencement address for Barnard College two months ago (two months ago today, as a matter of fact). Listen to what our president had to say to the Barnard graduates, about their career paths: “Don’t just fight for a seat at the table,” the President said. “Fight for a seat at the head of the table.”

That's what I am talking about when I suggest that – as a knowledge strategist – you are in a position to strengthen your role in the organization where you work. For our purposes, what this means is that specialist librarians, functioning as knowledge strategists, will take on a leadership role in their organizations. They must lead – in a proactive and participative way – even provocatively, sometimes – to unlock the ideas, skills, and motivation of their employees and their co-workers. It's a major part of our work, this leadership, and it is required because – when you get right down to it, cutting through the layers – the job of the knowledge strategist is to innovate and manage change.

Whether you are working in a specialized library or involved in some other work in the knowledge domain, what you're undertaking is basically a leadership role, one that supplements (and, truth to tell, strengthens) your position as a manager and as a strategist. You follow a line of leadership principles that you've learned at many different stages in your career.

Today, as we think about the knowledge strategist as knowledge thought leader, let's hone in on six of those leadership principles. Lee Igel has identified them for us, putting them forward in an important paper published in the May/June 2012 issue of *Physician Executive Journal*, and while I'm continually impressed with the work Lee does, this one really knocked my socks off. I'm a teacher, and I can tell you this: Lee's latest paper is going to be a standard text for my students from now on.

Here's why.

Lee's article is entitled "Six Core Principles for Creating Strong Physician Leaders," and it's my contention – and I've said this to Lee – that these principles are in fact appropriate for any manager/leader.⁷ I further contend that – as I stand here and encourage you to move from a career as a specialist librarian to your new role as your company's knowledge thought leader – these six principles will provide you with the framework you need to take charge of the enterprise-wide information, knowledge, and strategic management function in your organization.

Think about how you can apply Lee Igel's principles to your own ambitions, as you move into your new responsibilities as the company's knowledge strategist:

First, Lee writes, **focus on what needs to be done.** When you get wind of an up-coming knowledge initiative – or better yet if you are chosen by management to lead the knowledge initiative – be very clear about, as Lee puts it, "what the situation requires and the results that need to be achieved to make a difference." What is the organizational need driving the development of the initiative? Is it, for example, some gap between funding the information and knowledge requirements for a project and real project costs? If that's the case, put on your knowledge strategist hat and do what Victoria Harriston did at the National Academies of Sciences: convince project managers to include costs for information and knowledge services in the project budget before the decision is made to move forward with the project. Once those amounts are clearly established, the gap between real and guesswork financial requirements becomes a non-issue.

Second, **focus on values as the dominant chord.** What KD/KS values drive your company's work? I'm familiar with a specialist librarian, a healthcare specialist, who is participating in the development of a multi-element, global mHealth (mobile health) program connected with women's health in rural Africa. The program seeks to identify in-depth research and KD/KS currently in progress, and has little to do with the parent company's primary product line. The activity simply fits into the company's – and the specialist librarian's – value proposition that in addition to performing its normal business activities, the company is committed to contributing to the common good.

Third, **identify and respond to your professional "defining moment."** Achieving purpose is critical for leadership success and, as Lee writes, "unless the right people are in the right positions, no one will

⁷ Igel, Lee. "Six Core Principles for Creating Strong Physician Leaders," in *Physician Executive Journal*, May/June 2012.

be effective in achieving anything.” Here’s another Africa example: At one of the many NGOs in Nairobi, I became familiar with a situation in which the research library was not making much of a contribution to organizational effectiveness. In fact, just the opposite. Much research was being conducted, but not through the library. As it happened, the library hired a dynamo specialist librarian for one of its library management positions, and as knowledge strategy was developed for the larger organization, this specialist librarian found herself uniquely positioned to bring continuous upgrades to the overall knowledge services delivery picture. She was the right person in the right place at the right time, and it was a defining moment for the organization (and for the specialist librarian, I might add).

Fourth, ***put the emphasis on learning over metrics***. Of course we don’t ignore metrics, and quantification continues to play a big role in the management of specialized libraries. Yet what is measured doesn’t seem to have much to do with organizational effectiveness. Indeed, again quoting Lee, “What is needed are measurements that relate current performance to future effectiveness.” So the knowledge strategist asks, “What metrics are we using? Transactions? Effectiveness measures? ROI?” Although it could probably happen in the merger of any two or more separate organizations, in Australia I had an experience in which our team worked with two merging federal agencies seeking to combine knowledge services operations. What impressed me most about the assignment was the willingness of knowledge strategists in both agencies to assess and learn how to make use of the best metrics formats from both institutions, discarding those from which no future effectiveness would be realized. They focused on who would be receiving the information (and making decisions based on the metrics), and on what these people wanted (or needed) to know.

Fifth, ***embrace continuous learning and how it mobilizes multiple knowledges***. One of the toughest challenges for the knowledge strategist is the management of multiple formats and media, and what is learned from dealing with those challenges. In one situation with which I’m familiar, the knowledge strategist for a commercial magazine publisher has devised a splendid KD/KS framework for the design, maintenance, and usage and availability processes having to do with consumer content and, at the same time, worked with his staff in creating ease-of-use, format-agnostic, desktop-available records of all content relating to stories, layout and design, advertising, sales, and proprietary information. It was a phenomenal undertaking and actually required several years to get to implementation. Once in place, the critical inter-relationships amongst multiple knowledges established the publisher as a model for other firms doing similar work.

Sixth, ***conserve what works and abandon what doesn’t***. Lee writes about how “continuous learning increases the yield of what is known,” noting that “as a consequence, it is increasingly clear which methods are worth continuing and which should be dispatched.” One role of the specialist librarian/knowledge strategist is making these judgments. Working in an environment in which shared learning and teaching – a hallmark of the enterprise-wide knowledge culture – position the knowledge strategist for taking actions that might be awkward in other situations. For the knowledge strategist, expected to provide analysis, insight, and interpretation for a wide range of content-seeking clients, the “letting go” has to be part of the picture. The specifics can be as basic as working with the company’s records management and archives professionals to determine an enterprise-wide approach for digitizing corporate archives not born digital. Or it can be as sophisticated as determining whether – in a company in which there is a vibrant and well-managed research operation – supporting a stand-alone specialized library is feasible as information, knowledge, and strategic learning requirements transition from “what was” to “what will be.”

And then there is the even more practical side of knowledge strategy, and advice here comes from my colleague Tony Saadat, President and CEO of Soutron Global, known to many of us. I’m delighted to share with you some of Tony’s thinking about specialized librarianship and its connection with knowledge strategy.

For one thing, at Soutron Global the corporate tagline has to do with helping specialist librarians “transform” the specialized library. In my opinion, that is the perfect perspective for thinking about today’s (and the future’s) specialized libraries, and Tony and his team use it as their vehicle for working with the specialist librarian who is moving to knowledge strategy.

It happens this way:

We know – again based on a great deal of work in the field and particularly on the work of this association in the SLA Alignment Project – we know there is an established need to transform libraries. If the larger enterprise – the corporation, organization, or firm – is a knowledge culture and KD/KS is well managed, and if knowledge services – as an operational function – provides the foundation for KD/KS, it simply makes sense that transforming the specialized library increases the library’s value proposition (whether it’s called a “library” or not).

In Tony’s recommendations, that specialist librarian positions herself to bring her experience, expertise, and a KD/KS (or KD/KS-like) background to working with strategic knowledge through, of course, her “ordinary” work as a specialist librarian/information professional. But she also takes on other responsibilities that define her potential as a knowledge strategist: internal training, for example, working as a strategic learning specialist, using her subject-related and KD/KS expertise.

And what about her focus on internal enterprise-wide client-service and cross-functional knowledge services delivery? Doesn’t she understand – and serve as an advocate for – KM/knowledge services tools to support enterprise-wide content transfer, things like desktop content delivery? Or enterprise-wide content access via a comprehensive “KM system” (what we used to call the “corporate intranet”)? Tony believes strongly – and I agree – that the specialist librarian is the expert in all of these situations, and all of them directly connect to her ability to enable the implementation of the company’s knowledge strategy.

With this expertise, we specialist librarians/knowledge strategists go forward in our search for knowledge, always challenged to *return to meaning* as knowledge and meaning shift with the tides of civilization.

Just as we learn, in another quotation from my beloved Peter Drucker:

The search for knowledge, as well as the teaching thereof, has traditionally been disassociated from application. Both have been organized by subject, according to what appeared to be the logic of knowledge itself. ... Now we are increasingly organizing knowledge around areas of application rather than around the subject areas of disciplines. Interdisciplinary work has grown everywhere.

This is a symptom of the shift in the meaning of knowledge from an end in itself to a resource, that is, a means to some result. Knowledge as the central energy of modern society exists altogether in application and when it is put to work....⁸

As we continue – as specialist librarians – to strive (in James Gleick’s and Peter Drucker’s words) to “return to meaning,” indulge me by permitting me to read from the history of our association, cited earlier:

... in the past, putting knowledge to work (or, in its connection with knowledge services, putting knowledge management to work) was the driver that led intelligent and educated knowledge workers to enter into careers where they could assist in the process, where they could help others put knowledge (or knowledge management) to work.

⁸ Drucker, Peter F. *The Age of Discontinuity* (New York: Harper and Row, 1969).

In SLA's new century, that picture is very different. ... Now we truly are "working with knowledge." That is what we do now.

Today's SLA member, making an important and worthwhile contribution to the achievement of the organizational mission, is not only helping someone else.

He or she is engaging in a knowledge development and knowledge sharing experience, in KD/KS, actively participating in the knowledge process and contributing importantly to the success of that effort. ... As this branch of the library and information science profession is re-conceptualized and transformed, what the SLA member does today is, by and large, nearer to the work of the specialist librarian of the future – the knowledge strategist – than to the work of the specialized librarian of the past.

So go forward to knowledge strategy. Embrace knowledge strategy as your new focus for your career. You already exhibit those criteria for a successful career as a specialist librarian/information professional, the attributes that come with your work that make you so good at what you do. You have your passion for your work, you continue to grow with your intellectual curiosity, and your generosity of spirit lifts every client who comes to you for knowledge direction. All your qualities come together in your professional persona and define your excellence as a specialist librarian.

Now, as the knowledge domain moves beyond the cutting edge into a new and emerging collaborative way to work, take heart from yet one more piece of advice from President Obama:

"Look forward," our President says, "don't look back."

That's it: Look forward.

And let yourself become your company's knowledge strategist, its knowledge thought leader.

You will never regret it.

Thank you.

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