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Building the Knowledge Culture

SMR BRIEFING

OCTOBER 1, 2012

THE KNOWLEDGE STRATEGY AN OUTLINE FOR PRACTITIONERS

Organizational effectiveness begins with an enterprise-wide knowledge culture, built on a knowledge strategy supported by successful knowledge development and knowledge sharing (KS/KS). The knowledge strategy matches the company's business strategy.

To achieve KD/KS success and ensure the development of a meaningful knowledge strategy, corporate leaders turn to knowledge strategists, the company's knowledge thought leaders.

The knowledge strategist and the knowledge strategy team start with the knowledge audit, developing the knowledge strategy by applying their own background experiences and expertise to the audit findings. These are then incorporated into the knowledge strategy.

The main objectives of the knowledge strategy are:

- To empower staff and increase corporate and organizational efficiency, effectiveness, and accountability by providing easy access to accurate, timely, and relevant information and knowledge, including procedures that enable all organizational stakeholders to carry out their work effectively, make informed decisions, and promote an organizational culture of learning
- To strengthen internal collaboration and harness the organizational network in order to document and synthesize knowledge, experiences, best practices, and lessons learned
- To establish cost-effective organizational frameworks and systems to support priority knowledge needs, in order to improve evidence-based knowledge development and knowledge sharing (KD/KS).

The knowledge strategy describes how these objectives are to be achieved.

- Guy St. Clair

A. Why a "Knowledge Strategy"?

1. Organizational success – however defined – requires an established environment for managing intellectual capital
2. The knowledge domain is the environment in which intellectual capital is managed; the knowledge strategy provides the blueprint/guidelines for its management
3. Understanding the data/information/knowledge/learning framework enables collaboration and the application of knowledge for organizational success ("organizational effectiveness")
4. The KM/knowledge services operational function exists as one critical element of the larger, enterprise-wide corporate or organizational structure
5. Highest-level professional support in the knowledge domain creates an environment for innovation, contextual decision-making, strengthened research, and knowledge asset management

- B. It's all about *knowledge* and managing the organization's knowledge, its "intellectual capital"
 - 1. Knowledge
 - a. "What is known"
 - b. Information ("practical and utilitarian") for action based on insight and experience ("knowledge is information that is used")
 - c. Can – and often does – refer to both tacit and explicit knowledge
 - 2. Knowledge management (KM)
 - a. Usually defined as "working with knowledge"
 - b. Also often thought of as managing the knowledge eco-structure
 - c. For some knowledge workers, KM focuses on knowledge *access* through the utilization of an inventory or catalog (formal and/or informal) of the organization's intellectual infrastructure, available to and shared by all stakeholders
 - 3. Knowledge services
 - a. The *practical* side of KM ("putting KM to work")
 - b. Converges information management, KM, and strategic learning
 - c. Combines people, processes, and technology for managing information and knowledge assets at all functional levels
- C. Why a "Strategy"?
 - 1. Strategy – a group of actions or activities that produces an established or agreed-upon goal
 - a. Requires focus on organizational vision, mission, values
 - b. Serves as a blueprint ("road map") for action
 - c. Includes milestones for monitoring achievements and assessing results
 - 2. Strategic issues (for knowledge strategy): anything in the KD/KS context that causes concern or impacts organizational performance or effectiveness – the level of urgency depends on leadership perspective about each issue
 - 3. Strategic issues probably include (but are not limited to):
 - a. Organizational structure
 - b. Financial planning/management
 - c. Information management and information technology
 - d. KM/knowledge services management and delivery
 - e. Infrastructure planning/future services
- D. Knowledge Strategy vis-à-vis Corporate/Organizational Business Strategy
 - 1. Knowledge strategy (Drucker *et al.*)
 - a. Both opportunity-focused and results-focused
 - b. Supports enterprise-wide emphasis on knowledge needs and service-delivery successes for the larger organization
 - c. Enables decision making about KD/KS that balances objectives and needs against possible returns for the larger organization
 - 2. Separate knowledge strategy? Or knowledge-domain concepts incorporated into the corporate/organizational business strategy (Zack: "organizational business strategy that takes into account its intellectual resources and capabilities")?

Preparing the Knowledge Strategy

E. Establish the Perspective

1. Identify the perspective or point-of-view of the client organization with respect to the development of the knowledge audit (sometimes referred to as an analytical framework)
 - a. Carefully describe how the knowledge strategy is structured on the same basis for both the knowledge strategy team and management staff with responsibility for the audit (this point-of-view is usually evident in the results of the knowledge audit)
 - b. Categorize the reason or reasons for the development of the knowledge strategy
 - i. Solve a problem?
 - ii. Seek an innovative approach to a new product, concept, or activity?
 - iii. Conduct a management review for a group of functional units all focused on knowledge work?
 - iv. Other
2. Identify sponsors, advocates, and champions who have some affiliation with the knowledge-related situation under study; cultivate their understanding of the purpose and goals of the knowledge strategy (their support and enthusiasm will be required to ensure implementation success for the knowledge strategy)

F. Describe the Results of the Knowledge Audit

1. Demonstrate the direct connection between the company or organization's overall business strategy and the knowledge strategy. Is it clearly established? If not, make it so.
 - a. Company or organizational overview (if not included in the knowledge audit; if included in the audit, provide a brief summary)
 - b. The company or organization's business strategy
2. Describe the audit findings (in as much detail as required)
3. List and explicate recommendations based on the audit findings
4. Use the audit findings and recommendations to demonstrate how the company's knowledge strategy will
 - a. Foster a knowledge culture in the larger organization
 - b. Establish the client organization as a learning organization
 - c. Provide guidance for establishing corporate policies and procedures that support knowledge sharing

G. Propose a Core Strategy, including but not limited to such topics as

1. Leadership expectations
2. KM/knowledge services value proposition
3. Employee engagement/knowledge team development
4. Communication and reflection
5. Situational/environmental analysis
6. Priorities and requirements evaluation
7. Organizational strengths (especially relating to KM and knowledge services)
8. Key performance indicators
9. Untapped resources (missed opportunities?)
10. Technology issues
11. Analysis and evaluation
12. Strategic learning and continuous improvement

H. Proposal a Strategy Implementation Plan

1. Change management preparation – early in the process, create a change management/strategic learning plan (to ensure buy-in from all affected stakeholders)
2. Identify what's been done already (management needs to know if there has been an earlier approach to the situation under study)
3. Provide a statement of recommended activities, the knowledge “road map” for the company or organization
4. Identify required resources for implementing the knowledge strategy
5. Describe required awareness-building and marketing activities
6. Timeline – what will happen when?
7. Describe responsibility assignments – what are the staff requirements for which parts of the knowledge strategy?
8. Milestones and metrics – establish procedures for monitoring and measuring success along the way; for each milestone, ask these questions:
 - a. Who will be receiving the information and making judgments based on the metrics?
 - b. What do those people want (or need) to know?
 - c. How will the metrics be used? Are decisions based on these metrics?

I. Identify Risks – Does the Knowledge Strategy Involve Risk?

1. What kind of risk?
2. Who is affected?

J. Threats to the Proposed Knowledge Strategy

1. What barriers/impediments are or might be in place?
 - a. Environmental scan – if undertaken as part of the knowledge audit – might reveal possible *anticipated* threats or barriers; if that content is pertinent it should be summarized and included
 - b. Unanticipated threats or impediments (financial crises, natural or other disasters, *etc.* – generally not included in a knowledge strategy)
2. Is there a contingency plan and/or an exit strategy, in case the knowledge strategy cannot be implemented or if implemented, does not succeed?

K. Make Your Case and Conclude the Knowledge Audit

1. Collaboration is critical
 - a. Ensure that the entire knowledge strategy development process includes all affiliates (or their representatives) whose work in the corporate or organizational knowledge domain will be affected with the implementation of the knowledge strategy
 - b. Offer a preliminary or draft/interim report for commentary from critical enterprise management or leadership and, if appropriate, from other stakeholders as well
 - c. Review comments submitted and establish a process for incorporating or rejecting specific concerns, strengthening recommendations and/or procedures if required, and publishing and delivering final strategy document (usually with a presentation to selected leaders or organizational knowledge domain stakeholders)
2. Knowledge strategy
 - a. Is the strategy an end in itself or part of a larger KM/knowledge services function?
 - b. How is the strategy positioned within the company or organization as a knowledge culture?