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***Building the Knowledge Culture***

**SMR BRIEFING**  
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## **A KNOWLEDGE SERVICES GLOSSARY**

### **A GUIDE FOR CONVERSATION**

The last several years have seen an amazing growth of interest in knowledge management (KM), knowledge services, and knowledge strategy. For those of us working in the so-called “knowledge domain” – regardless of the specifics of our work – there is often discussion about our language, the jargon (in the positive sense of the word) we’ve developed for discussing what we do with others who are not part of the knowledge domain community or workplace.

Most of us in this field recognize that there can be no single way of describing the different elements of an organization’s knowledge domain, since each workplace represents an individual environment, specifically developed to meet the knowledge-sharing requirements of the people who make up that workplace community. All we can do is develop management and leadership principles for the specific knowledge domain in question (based on generally accepted management and leadership principles) and put those principles to work in our specific environment.

On the other hand, it does seem that we have developed a jargon, as I mention above. Most of us use these terms. Here at SMR International – where the work is focused on knowledge services – we frame our work in that particular language (hence the title of this briefing). At the same time, we acknowledge that many of these concepts, words, phrases, and constructs overlap in many other knowledge domain environments and it seems appropriate – at this point – to attempt to bring these together.

In response to an exercise for developing a glossary for a discussion group with which I’m affiliated, I thought it might be useful to describe some of these ways of speaking about knowledge services as we use these terms with SMR International clients, colleagues, members with whom we interact in professional associations, and others with whom we come in contact. Although the focus of the exercise for the discussion group is on knowledge strategy, this preliminary glossary is offered in the interest of opening the conversation and perhaps finding common language for describing our work.

This SMR Briefing is expected to be a fluid document, with the date/version changing as new concepts and terms are added or current ones revised. Here at SMR International we welcome input about these terms, and we look forward to broader discourse after this briefing is reviewed.

Please note that unattributed definitions are those we have developed over the years at SMR International. We apologize if some definitions and/or descriptions are misattributed. Just let us know and we’ll try to correct these errors or add specific attributions in a later version of this glossary.

- Guy St. Clair

Community of Practice	A group of people, often drawn from different functions within the organization, who work on similar processes or in similar practice areas, and who share experiences and knowledge.
Document Management	The process of managing documents and other means of information such as images from creation, review, storage to dissemination. Document management also involves the indexing, storage, and retrieval of documents in an organized method.
Intellectual Capital	<p>For an enterprise to succeed in achieving its operational objectives, and to function as a <i>knowledge-centric</i> organization, enterprise management must include the management of intellectual capital as a competitive asset.</p> <p>“Intellectual capital is the sum of everything everybody in a company knows that gives it a competitive edge.”</p> <p style="text-align: right;">– Thomas A. Stewart <i>Intellectual Capital: The New Wealth of Organizations</i> (New York: Doubleday/Currency, 1997)</p>
Knowledge	<ul style="list-style-type: none"> <li>a. “What is known”</li> <li>b. Information (“practical and utilitarian”) for action based on insight and experience (“knowledge is information that is used”)</li> <li>c. Can – and often does – refer to both tacit and explicit knowledge</li> </ul>
Knowledge Challenges	<p>Present-day discussions in the KM, knowledge services, and knowledge strategy field seem to identify six knowledge challenges (described below).</p> <p>[These are <i>current</i> knowledge challenges; they can be expected to change, some gradually, some sooner than we expect.]</p> <ul style="list-style-type: none"> <li>1 Knowledge Asset Management</li> <li>2 Information Governance</li> <li>3 e-Discovery</li> <li>4 Privacy and Security</li> <li>5 Data Analytics</li> <li>6 Big Data Strategy</li> </ul>
Knowledge Challenge – Knowledge Asset Management	As an operational function, knowledge asset management supports (and strengthens) all units and all departments of the enterprise, and knowledge strategists collaborate with colleagues as they exchange ideas, case studies, documents, best practices, and other information- and knowledge-sharing activities for succeeding in Knowledge Development/Knowledge Sharing/Knowledge Utilization (KD/KS/KU – see below).

Knowledge Challenge – Information Governance	Information governance is the specification of decision rights and an accountability framework to encourage desirable behavior in the valuation, creation, storage, use, archival and deletion of information. It includes the processes, roles, standards and metrics that ensure the effective and efficient use of information in enabling an organization to achieve its goals (Debra Logan—Gartner Blog Network, January 11, 2010). The knowledge strategist’s job is to coordinate these functions.
Knowledge Challenge – e-Discovery	Electronic discovery refers to discovery in civil litigation or government investigations that deals with the exchange of information in electronic format. Knowledge strategists working in e-discovery deal with a wide range of related issues, including document retention policies and enterprise content management practices, litigation holds, preservation, collection, processing of electronically-stored information, cost and risk management, and best practices.
Knowledge Challenge – Privacy and Security	Data, information, and knowledge privacy and security practices and policies are the responsibility of the overall enterprise management function, with knowledge strategists participating in the development of such policies and practices based on their expertise in intellectual capital management (knowledge management) and knowledge services leadership.
Knowledge Challenge – Data Analytics	Data analytics is the science of examining raw data with the purpose of drawing conclusions about that information. The knowledge strategist—while not necessarily a specialist in data analytics—is responsible and accountable for establishing policies and procedures that link data analytics conclusions to corporate or organization purposes.
Knowledge Challenge – Big Data Strategy	The term “big date” generally describes the voluminous amount of unstructured and semi-structured data created within a company or organization. As a result of the large quantity of date, it is difficult to process or analyze. The knowledge strategist has overall responsibility to work with big data “specialists,” to guide them as they seek to discover repeatable business patterns that can be utilized profitably in the company or be of value to the larger organization.

Knowledge Culture	<p>Shared beliefs and values about knowledge and the role of knowledge in the company or organization and, as appropriate, in the larger society. The knowledge culture is supported through knowledge development/ knowledge sharing, and knowledge utilization (KD/KS/KU) and managed through the development of a knowledge strategy.</p> <p>Attributes of the knowledge culture:</p> <ol style="list-style-type: none"> <li>a. Collaboration is a given – and expected – at all levels</li> <li>b. The role of information technology and communication in the KD/KS/KU process is acknowledged and enthusiastically embraced</li> <li>c. The intellectual foundations for the effort are respected – the intellectual quest is not disdained</li> <li>d. Ownership of the KM, knowledge services, and knowledge strategy development function is clearly established, with a carefully planned-out governance structure and a senior-level employee tasked to work with all organizational functions (the enterprise-wide “knowledge domain”).</li> </ol>
Knowledge Development/Knowledge Sharing – usually abbreviated KD/KS  (also Knowledge Development/Knowledge Sharing/Knowledge Utilization – usually abbreviated KD/KS/KU)	<p>Originally described as knowledge development and knowledge sharing but it was recognized in 2013 – in the work of Mor Sela, Founder and Principal Consultant at <a href="http://Bettercollaboration.com">Bettercollaboration.com</a> – that KD/KS requires a connection with knowledge utilization – KU – to ensure success in the management of intellectual capital in the knowledge domain.</p> <p>In some environments KD/KS/KU is described as “information management and collaboration,” recognizing that in most knowledge domain situations and with most knowledge strategists the knowledge domain language/jargon will connect with that used in the larger organization seeking success in KD/KS/KU.</p>
Knowledge Domain	<p>The environment in which intellectual capital is managed; the knowledge strategy provides the blueprint/guidelines for its management.</p> <p>All organizational activities, at every functional level, require KD/KS/KU. The principles of whatever line of work for which knowledge is developed and shared can be applied to the management of all of the company’s intellectual capital and, at the same time, ensure that knowledge services – as a management and service-delivery tool – rises to the highest levels knowledge services can achieve.</p>

Knowledge Management (KM)

- a. Usually defined as “working with knowledge” (Larry Prusak, with Tom Davenport). Prusak remarks that they would like to “take back” the “knowledge management” term: “It really is *working with knowledge* (not managing knowledge). You can’t manage knowledge *per se*. You can’t manage love, or honor, or patriotism, or piety. It is clearly *working with knowledge*, but the words got there, and there it is.”
  - De Cagna, Jeff. “Keeping Good Company: A Conversation with Larry Prusak,” *Information Outlook* 2 (5), May, 2001
- b. Also, often thought of as “managing the knowledge eco-structure.”
  - Steven B. Abram, private conversation
- 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

Alternatively, knowledge management is the definition, creation, capture, usage, sharing, and communication of the wisdom accumulated by workers over their years of experience – in other words, the intellectual capital of an organization.

Knowledge Services

- a. The management and service-delivery methodology that converges (encompasses) information management, knowledge management, and strategic learning into a single over-arching function.
- b. The practical side of KM (“putting KM to work”), enabling accelerated innovation, contextual decision-making, strengthened research, and excellence in knowledge asset management (however “knowledge asset” is defined)
- c. Combines people, processes, and technology for managing information and knowledge assets at all functional levels, ideally enterprise-wide.

Knowledge Services  
Audit (“Knowledge  
Audit”)

A process for reviewing and mapping organizational information, knowledge, and strategic learning need, creation, use, flow, and storage, identifies gaps, duplication, costs, and barriers to effective information flow and establishes knowledge value in (for) the larger organization.

Sometimes considered an inventory of the organization’s intellectual infrastructure, the knowledge services audit combines the methodologies of the standard *needs analysis* (asking what information resources and services people require to do their work), the *information audit* (which determines how information resources and services are actually used), and the *knowledge audit* (which looks at knowledge assets and how they are produced and by whom).

Alternatively, the knowledge services audit is defined as a systematic examination and evaluation of an organization’s explicit and tacit knowledge assets (“knowledge resources”). The objectives of the knowledge services audit are:

- a. to determine what knowledge is required by staff
- b. to identify how information and knowledge are used, and
- c. to establish the extent to which this knowledge use contributes to meeting larger organizational objectives.

In practical terms, the knowledge services audit is a statement of things as they are with respect to KM, a statement of things as they should (could) be, and a description of the gaps between the two.

The knowledge services audit take a broad and shallow approach as opposed to a narrow and deep approach to assessing business needs, a key difference between a knowledge services audit and other audits.

Knowledge Services  
Audit (Core Elements)

Knowledge services audit core elements include but are not limited to:

- a. Identification of current trends in knowledge services management
- b. Identification and evaluation of range of services provided for implementing knowledge services
- c. Description of strategic benefits of these services (*e.g.*, perceived value)
- d. Description of metrics and key performance indicators
- e. Determining the knowledge services link to organization/corporate vision, mission, and values
- f. Identification of strategic learning and continuous improvement

Knowledge Services Audit: The Seven-Stage Model

- 1 Planning
- 2 Data Collection
- 3 Data Analysis
- 4 Data Evaluation
- 5 Communicating Recommendations
- 6 Implementing Recommendations
- 7 The Knowledge Services Audit as a Continuum

Adapted from:  
– Henczel, Sue.

*The Information Audit: A Practical Guide*  
(Munich: K.G. Saur, 2001)

Knowledge Sharing =  
Collaboration

- a. Collaboration is a principle-based process of working together, which produces trust, integrity, and breakthrough results by building true consensus, ownership, and alignment in all aspects of the organization...
- b. Put another way, collaboration is the way people naturally want to work...
- c. Collaboration is the premier candidate to replace hierarchy as the organizing principle for leading and managing the 21st century workplace..."

– Marshall, Edward M.

*Transforming the Way We Work: The Power of the Collaborative Workplace* (New York: American Management Association, 1999)

## Knowledge Strategist

The knowledge strategist is the organization or company's knowledge thought leader, with authority, responsibility, and accountability for developing and implementing strategies for knowledge services (that is, for managing information, knowledge, and strategic learning).

These activities provide focus for the knowledge strategist for designing and planning knowledge-related activities and policy, and in particular the knowledge strategist is expected to give attention to future knowledge-related roles and activities that will affect corporate or organizational success.

## Knowledge Strategy

The management discipline that ensures organizational effectiveness by matching intellectual capital management with the corporate or organizational mission.

"...the organization's business strategy that takes into account its intellectual resources and capabilities"

– Michael F. Zack "Developing a Knowledge Strategy"  
*California Management Review*, 41 (3), Spring, 1999

Alternatively, knowledge strategy is defined as a group of actions or activities that produces an established or agreed-upon goal, a plan to be executed in the future to achieve specific knowledge-sharing objectives and viewed as a combination of the actions that are intended to result in anticipated business outcomes.

Also, the actions that emerge as a result of the many complex activities that are undertaken within an organization:

- a. the actions that are intended to result in anticipated business outcomes
- b. the actions that emerge as a result of the many complex activities that are undertaken within an organization.

– Shawn Callahan (Anecdote, Melbourne AUS)

Developing the knowledge strategy:

- 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

## Knowledge Strategy

*vis-à-vis*

## Corporate/Organizational Business Strategy

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/KU that balances objectives and needs against possible returns for the larger organization



Knowledge Strategy (formerly “strategic planning” for knowledge work or – historically – “long-range planning” for knowledge work)

A two-part document or statement that details the organizational or business approach to success with KD/KS/KU:

- 1) Strategy: aspirational (inspirational)
- 2) Implementation Plan: practical (tactical)

Knowledge Strategy (Core Elements)

Core elements of the knowledge strategy include but are not limited to:

- a. Leadership expectations
- b. KM/knowledge services value proposition
- c. Employee engagement/knowledge team development
- d. Communication and reflection
- e. Situational/environmental analysis
- f. Priorities and requirements evaluation
- g. Organizational strengths (especially relating to KM and knowledge services)
- h. Key performance indicators
- i. Untapped resources and missed opportunities
- j. Technology issues
- k. Analysis and evaluation
- l. Strategic learning and continuous improvement

Knowledge Strategy Implementation Plan Elements

Core elements of the knowledge strategy Implementation Plan include but are not limited to:

- a. Change management preparation
- b. Identification of prior knowledge strategy/implementation
- c. Recommended activities (the knowledge “road map”)
- d. Resource requirements
- e. Awareness-building and marketing activities
- f. Training requirements
- g. Timeline
- h. Responsibility assignments
- i. Milestones and metrics
- j. Target audience (how will the strategy be used)?
- k. Risk identification, threats, anticipated barriers and impediments (anticipated and unanticipated, *e.g.*, per environmental scan)
- l. Contingency plans and/or exit strategy, in case the knowledge strategy cannot be implemented or if implemented, does not succeed?

Strategic Issues (in the Knowledge Domain)

Anything in the KD/KS/KU context that causes concern or impacts organizational performance or effectiveness – the level of urgency depends on the leadership perspective about each issue. 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

Strategic Learning  
(Organizational Learning)

The successful achievement of skills, competencies, knowledge, and behaviors through professional learning, staff development and professional growth, all required for excellence in workplace performance. As a result, Strategic Learning enables those who develop knowledge to share it, for the benefit of everybody in the workplace (*i.e.*, combines knowledge development with knowledge sharing and knowledge utilization – KD/KS/KU)

The convergence of knowledge management, knowledge services, and strategic (organizational) learning are synergistic. All three are about people – the relationships between people, different areas of a company, and multiple stakeholders.

Alternatively, strategic (organizational) learning can be any process – formal or informal – through which knowledge workers acquire information and knowledge that improves or enhances work performance.