

A Management Consultancy Specialization

# KNOWLEDGE MANAGEMENT AND KNOWLEDGE SERVICES

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October 9, 2015

Managing the  
Corporate  
Knowledge  
Domain

# WHAT A KM/KNOWLEDGE SERVICES CONSULTANT THINKS ABOUT

In this example, the focus is on *Knowledge Services*, frequently the subject of consulting studies. “How can we share knowledge better?” the client asks. We start with Knowledge Services:

- The management methodology—the management technique—that converges information management (including technology management), knowledge management, and strategic learning for the benefit of a parent organization or business.
- Often thought of as the “practical side” of knowledge management, as “putting KM to work,” so to speak. It connects with organizational success as knowledge workers seek to improve knowledge sharing in the company or the organization.

# WHAT A KM/KNOWLEDGE SERVICES CONSULTANT THINKS ABOUT

What's the result? When the focus is on *Knowledge Services*:

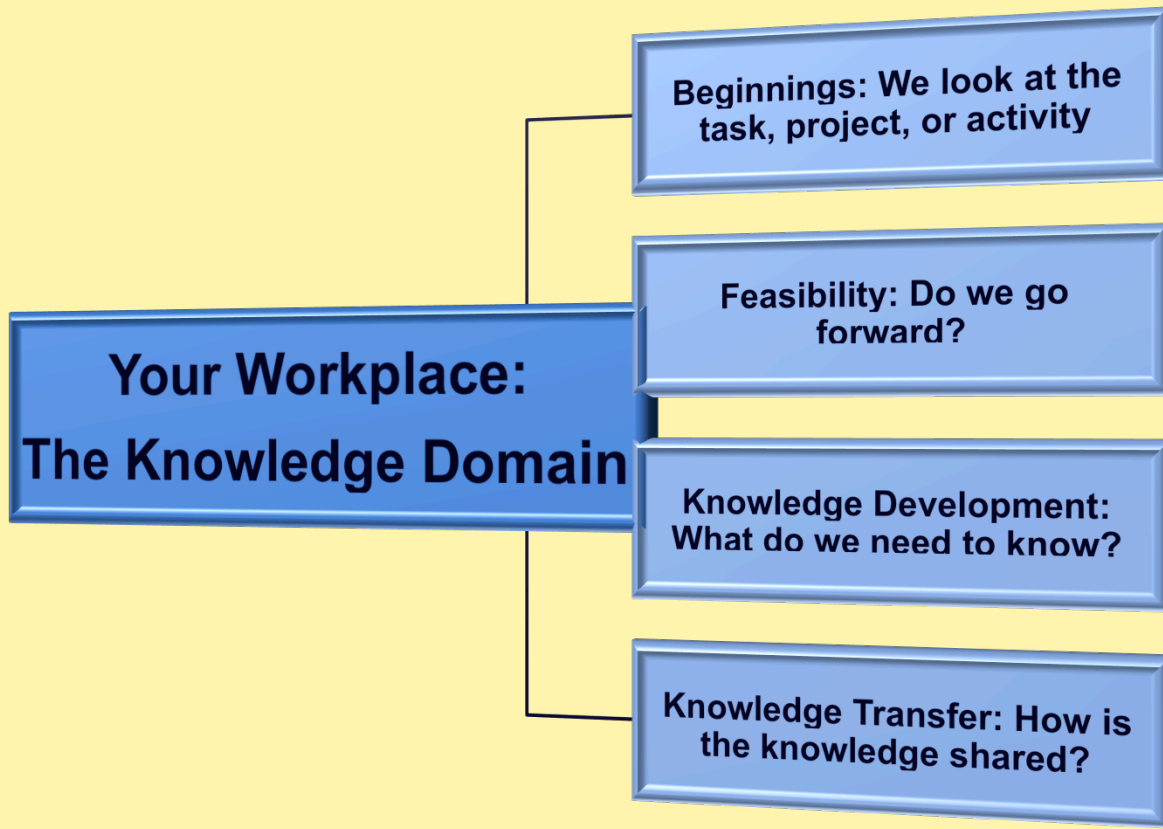
- Knowledge sharing is enabled (or strengthened) as the parent enterprise moves forward in achieving its organizational or business mission. In organizations, knowledge services is recognized as enabling knowledge development, knowledge sharing, and knowledge use (or application), characterized with the popular acronym KD/KS/KU.
- Enterprise leaders and organizational managers embrace knowledge services as the critical element in the development of a knowledge strategy for the company or the organization, establishing a structure that ensures knowledge sharing throughout the organization, for the benefit of all stakeholders and affiliates.

# WHAT A KM/KNOWLEDGE SERVICES CONSULTANT THINKS ABOUT

## AGENDA

- The “knowledge domain” as workplace
  - Every organization succeeds or falls depending on what its people know
- Defining our terms
  - What is “KM”? What is “Knowledge Services”?
- The challenge for knowledge workers
  - The KD/KS/KU process
- The organization as a knowledge culture
  - Knowledge strategy = knowledge sharing (for the benefit of the organization and its people)

# THE CHANGING WORKPLACE



# THE CHANGING WORKPLACE

## Knowledge Worker

Writers  
Editors  
Analysts  
Advisors  
[sometimes subject-specific]

## Strategic Knowledge Professional

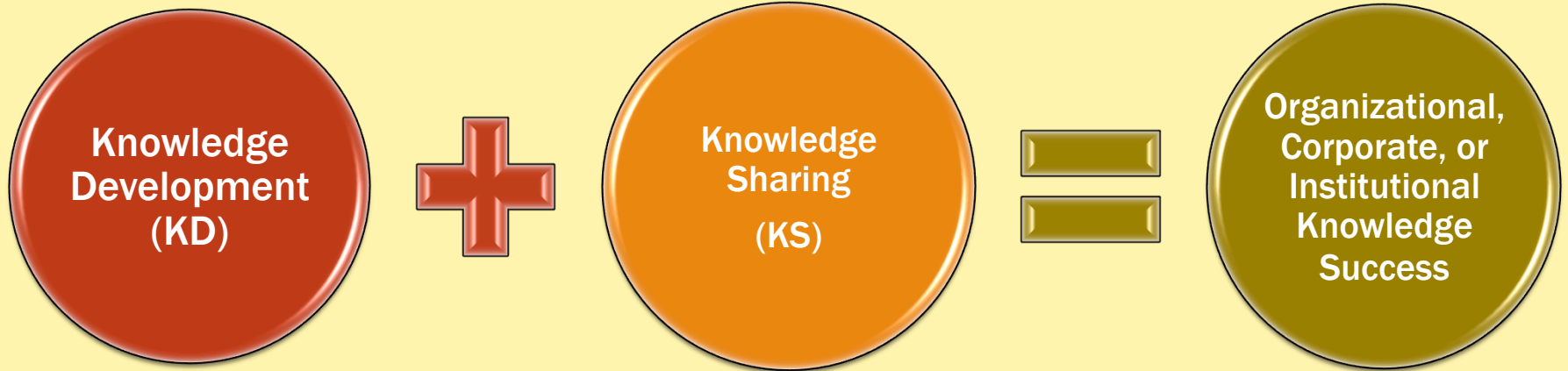
Specialist librarians  
Information professionals  
Content professionals  
Records managers  
Corporate archivists  
[all usually subject-specific]

## Knowledge Strategist

Knowledge services managers: developing and implementing strategies for managing information, knowledge, strategic learning  
  
Responsible for corporate-wide KD/KS/KU success

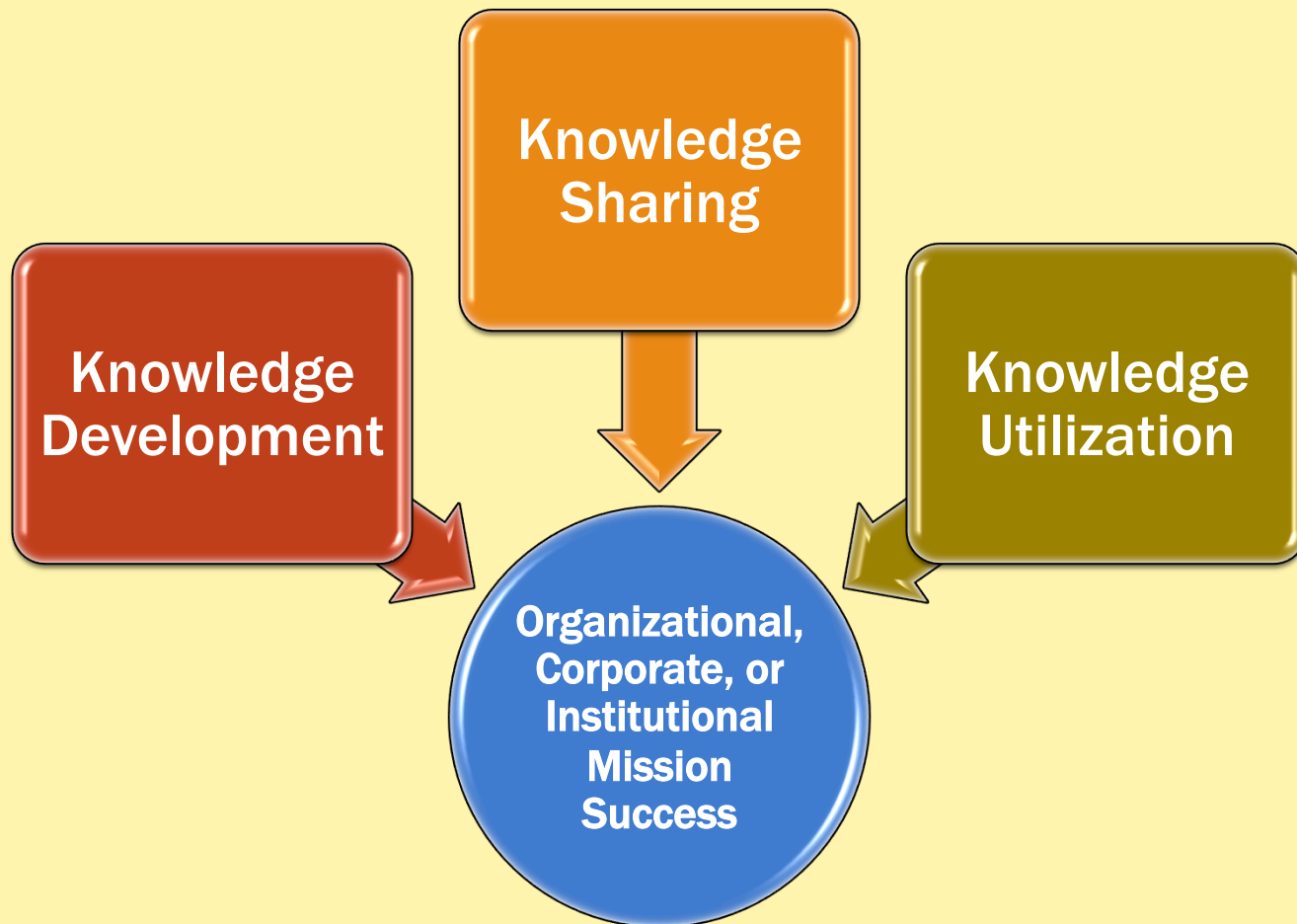
# THE CHANGING WORKPLACE

## The Early 21<sup>st</sup> Century Workplace



# THE CHANGING WORKPLACE

## Today's Workplace





# THE CHANGING WORKPLACE

Enterprise Content  
Management (ECM) +  
Information Technology (IT)

The diagram consists of two large, dark red, stylized arrows pointing towards each other on a yellow background. The left arrow contains the text 'Enterprise Content Management (ECM) + Information Technology (IT)'. The right arrow contains the text 'Knowledge Management/ Knowledge Services/ Knowledge Strategy = KD/KS'.

Knowledge Management/  
Knowledge Services/  
Knowledge Strategy =  
KD/KS

# THE KNOWLEDGE CULTURE

**“Shared beliefs and values about knowledge and the role of knowledge in the company or organization and, as appropriate, in the larger society”**

- **Managed with Knowledge Services, incorporating Knowledge Development, Knowledge Sharing, and Knowledge Utilization (KD/KS/KU)**
- **Structured on (based on) Enterprise-Wide Knowledge Strategy**

**Attributes of the knowledge culture:**

- **is a given – and expected – at all levels**
- **The role of information technology and communication in the KD/KS process is acknowledged and enthusiastically embraced**
- **The intellectual foundations for the effort are respected – the intellectual quest is not disdained**
- **Ownership of the KM 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.”**

# THE CHANGING WORKPLACE

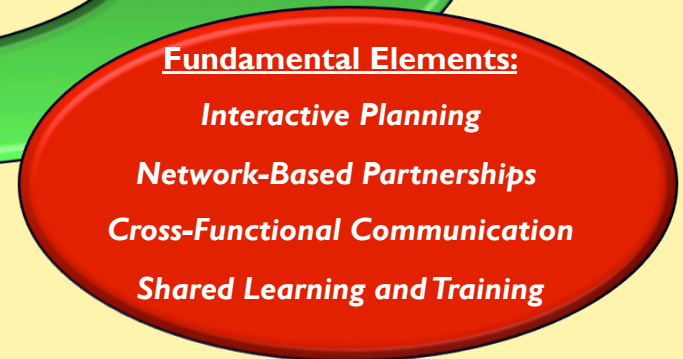
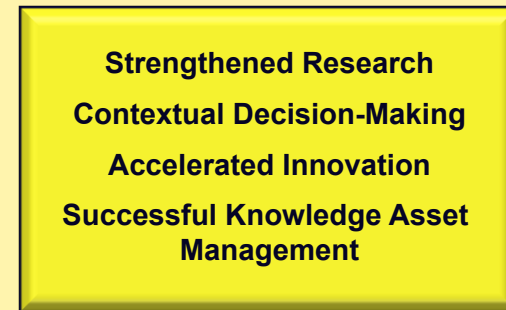
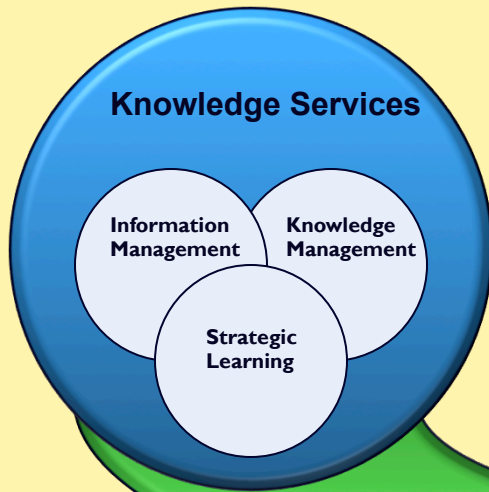
## The Knowledge Culture

- intellectual capital recognized as the institution/organization's most critical asset
- collaboration – KD/KS/KU – intellectual enthusiasm support institutional goals

## Knowledge Services

- information management, KM, and strategic learning converge for organizational effectiveness
- “natural” opportunities and applications in the business/organizational environment

# Knowledge Services



# IT AND INFORMATION MANAGEMENT (IM)

- Information Management - a workplace methodology concerned with the acquisition, arrangement, storage, retrieval, and use of information to produce knowledge.
- IM – powered by information and communication technology (ICT): any product that stores, retrieves, manipulates, transmits, or receives information electronically in a digital form.

# KNOWLEDGE MANAGEMENT (KM)

- Knowledge Management (KM):
  - a way of working - helps us manage explicit, tacit, and cultural information in ways that enable us – and our workplace – to re-use information to create new knowledge
  - an established atmosphere or environment in which KD/KS is established as the essential element for the achievement of the corporate mission

But you can't *manage* knowledge. You work with knowledge  
KM is simply: *Working with Knowledge*

- Laurence Prusak

- KM – powered by KD/KS
  - through the utilization of IT/ICT (conventional wisdom)
  - in reality – the *human interface* – is now recognized as the critical element of KM

# KM? KNOWLEDGE SERVICES?

## Which is it? What's it to be?

Past confusion between what is shared (knowledge) and the means used to share it (information management, including IT) – a natural confusion.

That confusion is now disappearing, once we bring in strategic learning.

Now we speak of **Knowledge Services**, the melding of two never-very-distinct disciplines, with IM and KM converging with strategic learning to release the power of knowledge, to ensure that knowledge is utilized to achieve corporate, organizational, or institutional goals.

# INFORMATION MANAGEMENT AND KM



Photo: Kentv



# STRATEGIC LEARNING

- ... the successful achievement of skills, competencies, knowledge, behaviors, and/or other outcomes required for excellence in workplace performance
- ... 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)

Or less pompously: *Strategic Learning* is anything anybody does to learn how to work better – to work smarter....

# KNOWLEDGE SERVICES: The *Practical* Side of KM

## “Putting KM to Work”

### TRANSITIONING

- Information, Knowledge, and Strategic Learning to *Strategic* Knowledge

### ENABLING

- Contextual decision-making
- Accelerated innovation
- Strengthened research
- Excellence in knowledge-asset management

### SUPPORTING

- An enterprise-wide knowledge culture
- Strategic KD/KS
- Organizational effectiveness

# KNOWLEDGE SERVICES ACROSS THE COMPANY / ORGANIZATION

## Research and Development

(CoPs, Knowledge Networks, Social, Web 2.0,  
Network Analysis, etc.)

**Knowledge Repository Management**  
(Reports, studies, background and  
client- and project-related content. )

**Enterprise Content  
Management**

**Enterprise-wide  
non-knowledge  
related functions  
(usually internal)**

**Records,  
archives, digital  
assets, research  
library services**

**External relations  
(client/customer,  
other affiliates)**

# KNOWLEDGE SERVICES = COLLABORATION

**Principle-based**

**The way people naturally want to work**

**Replaces (or challenges) hierarchy**

# THE CONNECTION: KNOWLEDGE SERVICES AND STRATEGY

## ■ Knowledge Strategy

- Something like “a set of actions or activities that will produce an established and/or agreed-upon goal”
- A strategy is “a plan to be executed in the future to achieve specific objectives”:
  - Strategy should be viewed as a combination of
    - the actions that are intended to result in anticipated business outcomes; and
    - the actions that emerge as a result of the many complex activities that are undertaken within an organization

Shawn Callahan

## ■ Knowledge Strategy:

- The organization’s business strategy that “takes into account its intellectual resources and capabilities”

Michael Zack

[See SMR blog: September 30, 2010]

# STRATEGY DEVELOPMENT: PURPOSE AND IMPLICATIONS

## For staff

- Strengthened research management
- Subject-specific knowledge services within functional units

## For management

- Development and sharing of content required for effective decision making
- Organizational KD/KS environment a given

## For clients/ customers

- Content/information currency
- User experience (UX) foundation for service delivery

# FOR CONSULTANTS: THE KNOWLEDGE STRATEGY LINK

- **Knowledge Strategy Development: Strategic Issues**
  - A strategic issue is something which causes concern because of its expected impact on the aims of the organization (expressed as goals, mandates, mission, values, etc.) and which requires urgent action if the organization is to survive and prosper:
    - Organizational structure
    - Financial planning/management
    - Information management and information technology
    - Knowledge services management and delivery
    - Infrastructure planning/future services

# THE KNOWLEDGE SERVICES CONSULTANT

- **Management Consultants: What Do We Do?**
  - “The consultants’ role is discovery and providing insight and advice, based on observation and practice.” Peter F. Drucker
- **Knowledge Services:**
  - The Information-Knowledge Strategy Link**
    - Definitions – “Talking the Talk and Walking the Walk”
    - Knowledge Strategy Development
      - Internal Management Consultant
      - External Expertise
    - Strategy Framework
      - Inspirational/Aspirational
      - Practical/Step-by-Step/Actions, Milestones, and Results (Deliverables)
- **Change Management**



# THE KNOWLEDGE SERVICES CONSULTANT

- Expert advisor (usually external but not always – see below)
- Client pays consultant for their “smarts”
  - Experience
  - Contacts
  - Education and prior expertise development
  - Unique position in the industry or profession
- Collaborates with/advises client (not usually the project manager but works *with* project manager and team)
- Fee basis varies
  - Contract basis
  - Retainership or project fee
  - Volunteer

# THE KNOWLEDGE SERVICES CONSULTANT

## KNOWLEDGE SERVICES TO KNOWLEDGE STRATEGY

### ■ The Players

- Company/Organizational Management
- *Knowledge Thought Leaders*

[See SMR blog: November 10, 2010 and November 17, 2010]

- Internal Management Consultant
- External Expertise

### ■ The Product

- Introduction (inspirational/aspirational)
- Practical Step-by-Step: Actionable Recommendations, Milestones, Measure/Metrics, and Results (Deliverables)

### ■ The Review

- Best Practices
- Lessons Learned

[See SMR blog: June 8, 2010]

# THE MANAGEMENT CONSULTANT'S ROLE

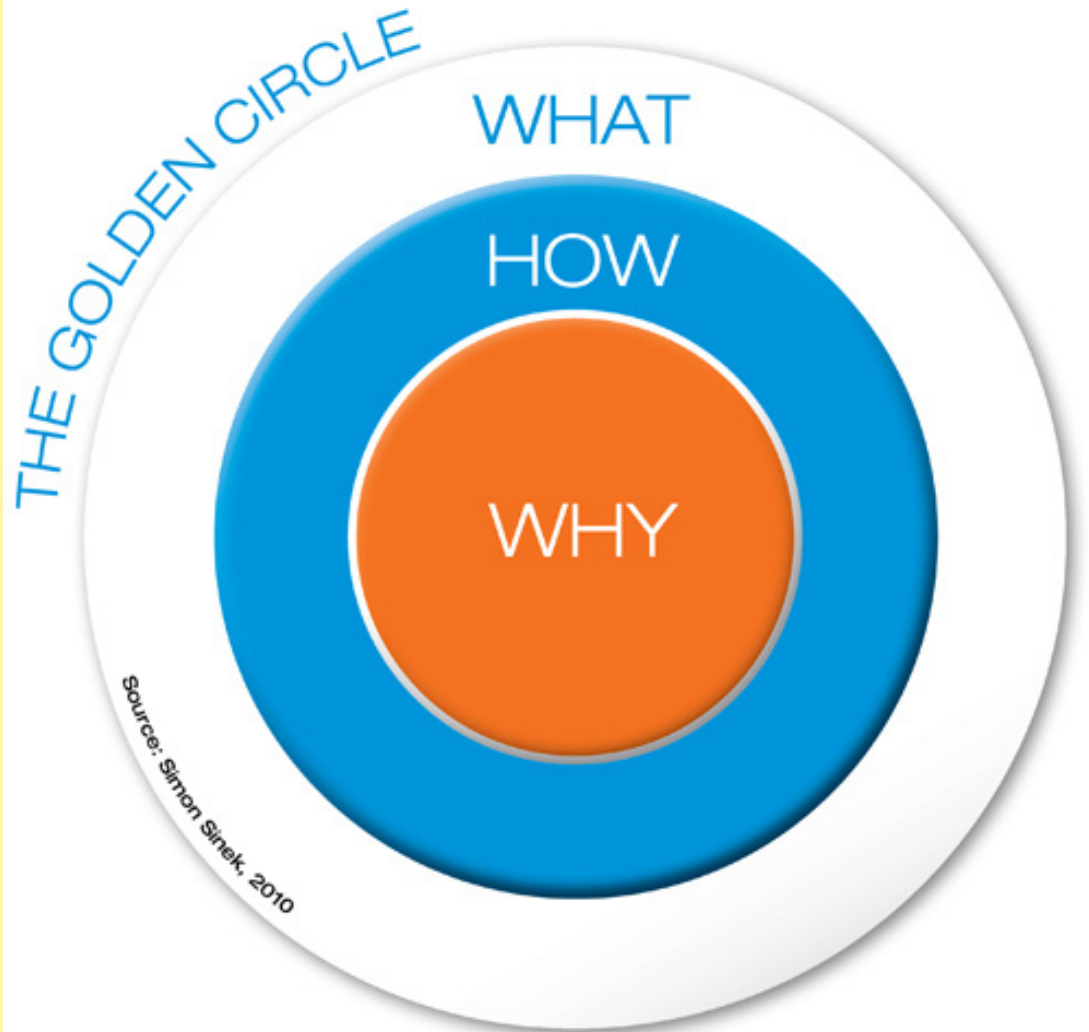
## YOUR WORK AS A CONSULTANT

- What is the subject of your project?
- Narrow the subject – does it have to be as broad as it is in your mind now?
  - What is the *SCOPE*
  - Who is involved? *WHO* will be affected?
- What are you trying to accomplish with the project?
  - Not *WHAT* you want to do
  - Not *HOW* do you propose to do it
  - Begin with the purpose: *WHY* are you doing this project?

# THE MANAGEMENT CONSULTANT'S ROLE

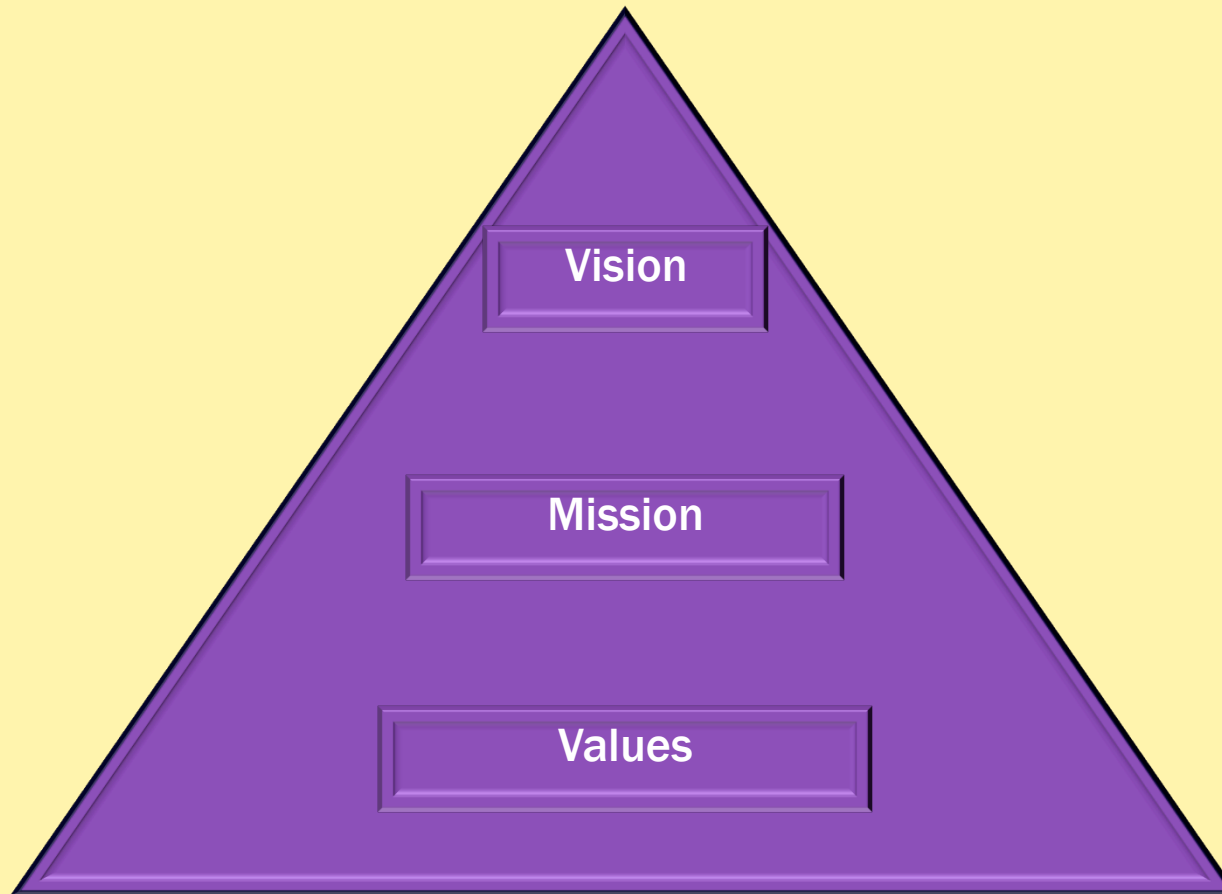
## SIMON SINEK'S GOLDEN CIRCLE

- *Start with Why: How Great Leaders Inspire Everyone to Take Action*  
(New York: Portfolio/Penguin, 2009)
- TEDx Talk: [How Great Leaders Inspire Action](#)  
(November 2009)



# THE MANAGEMENT CONSULTANT'S ROLE

## YOUR WORK AS A CONSULTANT



# THE MANAGEMENT CONSULTANT'S ROLE

## YOUR PROJECT PROCESS

- Who knows about your subject? Who can advise you?
  - Personal/Professional/Business colleagues
  - Professional associations and organizations
- Research libraries/specialized libraries
- Project resources (“technical bibliography”)?
- SMR Links:
  - [Use the Project Management Model in Your Work as a Knowledge Services Management Consultant](#) (October 15, 2014)
  - [Developing Your Knowledge Strategy Begins with the Knowledge Audit/Knowledge Assessment Proposal](#) (October 9, 2014)

# THE MANAGEMENT CONSULTANT'S ROLE

## YOUR PROJECT PROPOSAL

- **INTRODUCTION**
  - Why this project?
  - What's the problem? or initiative/innovation?
- **PROJECT OBJECTIVE**
- **STATEMENT OF WORK**
  - Research
  - Framework development and report preparation
- **DELIVERABLES**
- **EXPERIENCE AND PAST PERFORMANCE**

# THE MANAGEMENT CONSULTANCY FUNCTION

## Review and Assess

**Inventory/Catalog  
the Organization's  
Vision, Mission, and  
Values Infrastructure**

**Identify Assets and  
Enablers (People  
and Things) to  
Progress**

**Identify Gaps and  
Constraints**

## Define (Establish) Objectives

**Improved Enterprise-  
Wide Collaboration,  
Communication,  
and Innovation**

**Successful  
KD/KS/KU  
(Emphasis on  
Knowledge Sharing)**



# MANAGEMENT CONSULTING

(A typical project framework)

**Phase 0: Scoping/  
Project Prep**

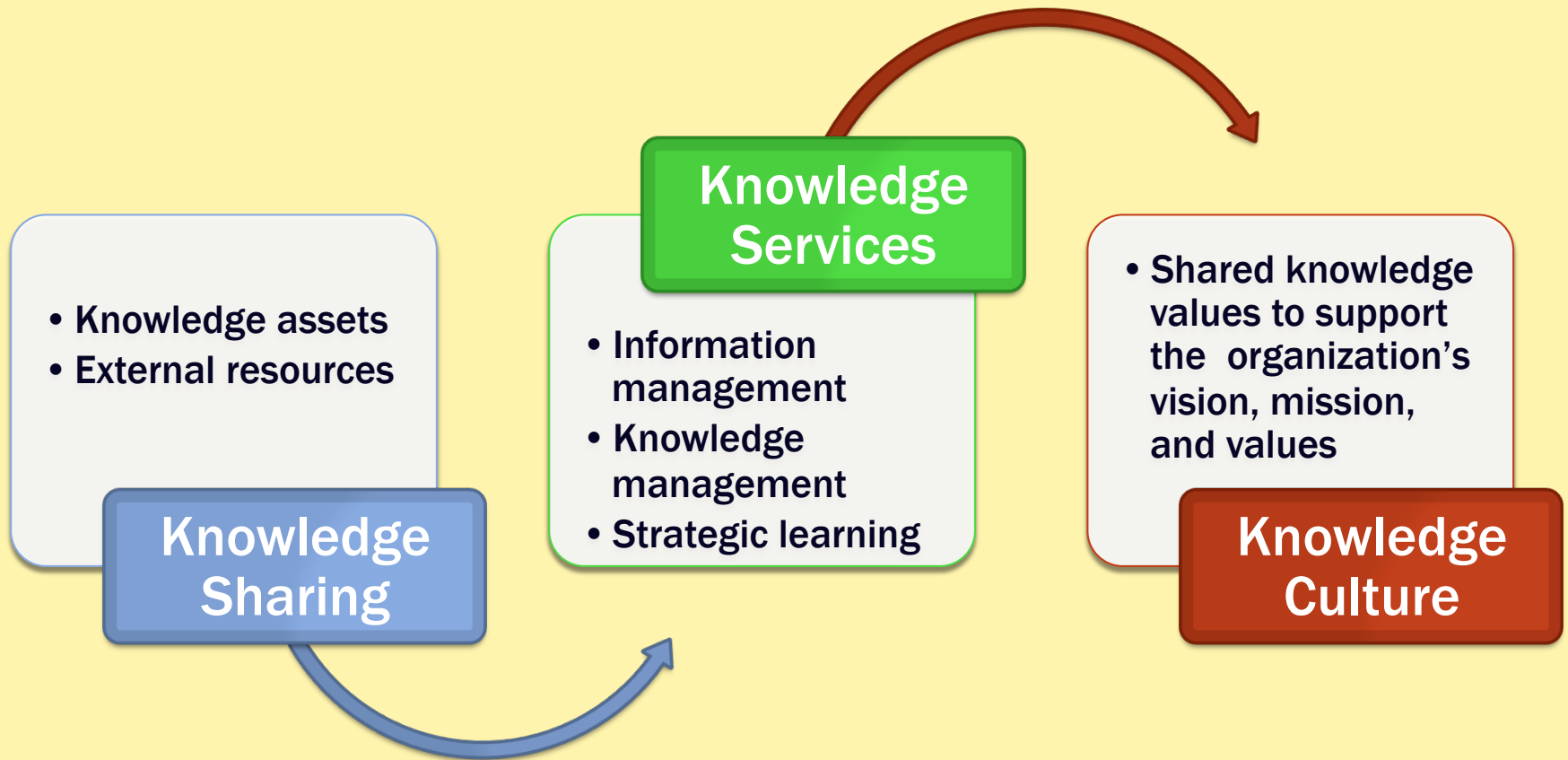
**Phase 1: Needs  
Assessment/  
Objective  
Development  
[Knowledge Audit]**

**Phase 2: Strategy  
Development**

**Phase 3: Solution  
Development  
Generate and Defend  
Recommendations**

**Phase 4: Present  
Recommendations  
(Solution  
Implementation)**

# THE MANAGEMENT CONSULTANT'S JOB: TO STRENGTHEN THE CLIENT ORGANIZATION



# WHAT A KM/KNOWLEDGE SERVICES CONSULTANT THINKS ABOUT

## Start with What is Right Rather than What is Acceptable

Alfred P. Sloan, Jr. at General Motors Corporation in 1944, to Peter F. Drucker, who was just beginning his (later very famous) study for the company:

“I shall not tell you what to study, what to write, or what conclusions to come to. My only instruction to you is to put down what you think is right as you see it. Don’t you worry about our reaction. And don’t you, above all, concern yourself with the compromises that might be needed to make your recommendations acceptable. There is not one executive in this company who does not know how to make a compromise without any help from you. But he can’t make the right compromise unless you first tell him what ‘right’ is.”

“Decision Making” (October 3) in  
*The Daily Drucker* (New York: HarperBusiness, 2004).

# KNOWLEDGE STRATEGY: KNOWLEDGE SERVICES IN THE ORGANIZATION

**Yet this world of ours is, after all, our  
very own; we make it and we can  
reform it nearer to the heart's desire.**

**Ralph Walker  
American Architect (1889-1973)**

# KNOWLEDGE STRATEGY: KNOWLEDGE SERVICES IN THE ORGANIZATION

**Make No Small Plans.  
They Have No Magic to Stir Men's  
Blood.**

Daniel Hudson Burnham  
American Architect (1846-1932)

# THANK YOU

## Contact information

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SMR International Blog: [SMR Int'l - Knowledge Services Notes](#)

Guy St Clair Personal Blog: [Sharing Guy's Journey](#)