

# INTRODUCING KNOWLEDGE SERVICES

Initiative Fortbildung für wissenschaftliche Spezialbibliotheken und verwandte Einrichtungen e.V.

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Managing  
Information,  
Knowledge, and  
Strategic Learning  
in the 21st Century  
Organization

## THE CHALLENGE

All organizations have problems with knowledge sharing.

Information, knowledge, and strategic learning outcomes in support of organizational success are not shared as well as they should (or could) be shared.

## THE SOLUTION: THE KNOWLEDGE STRATEGIST\* WILL

### ■ Knowledge Services

- Define knowledge services
- Identify successful knowledge services applications
- Customize knowledge services for this organization

\* Role taken by the specialist librarian/information specialist

## THE SOLUTION: THE KNOWLEDGE STRATEGIST\* WILL

- **Knowledge  
Audit/Opportunity  
Assessment**

- **Inventory the organizational  
intellectual infrastructure:**

- Who needs what information, knowledge, strategic learning outcomes?
- How do they get it?
- How do they use it?

\* Role taken by the specialist librarian/information specialist

## THE SOLUTION: THE KNOWLEDGE STRATEGIST\* WILL

- **Knowledge Audit/Opportunity Assessment Findings**
- Identify knowledge-sharing gaps
- Identify viable/"working" knowledge-sharing activities
- Prepare preliminary recommendations

\* Role taken by the specialist librarian/information specialist

# THE SOLUTION: THE KNOWLEDGE STRATEGIST\* WILL

## ■ Corporate Knowledge Strategy

- Prepare and document knowledge strategy statement with implementation plan:
  - Knowledge services sponsorship
  - Organizational/corporate ownership
  - Recommended knowledge services activities
    - Operational responsibility and authority
    - Timeline
    - Required resources (financial, human capital, change management, training and learning, etc.
    - Critical success factors: management metrics, return-on-investment, and effectiveness measures.

\* Role taken by the specialist librarian/information specialist

## THE RESULT: THE DESIRED EFFECT

### ■ The Organization Transitions to a Knowledge Culture

### ■ A company, organization, or institution characterized by:

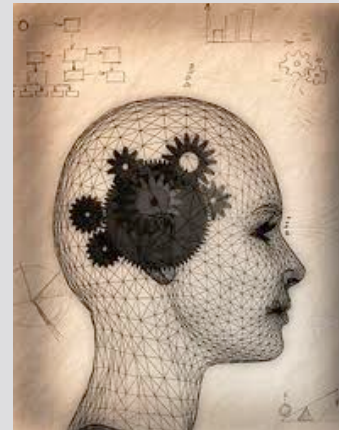
- Leadership in information management, knowledge management, and strategic learning
- Collaboration at all functional levels
- Breadth of scope
- Technology and communications maturity
- Management enthusiasm and support for knowledge sharing in all (appropriate) information, knowledge, and strategic learning situations and opportunities
- Value creation

# THE KNOWLEDGE SERVICES OPPORTUNITY IN THE 21<sup>ST</sup> CENTURY ORGANIZATION

**What We're All About:** The one issue that increasingly challenges all knowledge workers—including business and enterprise leaders—is the management of *intellectual capital*.

Intellectual material that is put to use to create wealth ... the sum of everything everybody in a company knows that gives it a competitive edge.

*(Intellectual capital: the new wealth of organizations, 1997)*  
Thomas A. Stewart





# **1. INTRODUCING KNOWLEDGE SERVICES**

Knowledge  
Services in the  
Organizational  
Context

# THE KNOWLEDGE SERVICES OPPORTUNITY IN THE 21<sup>ST</sup> CENTURY ORGANIZATION

We use *strategy* to *achieve* our goals.

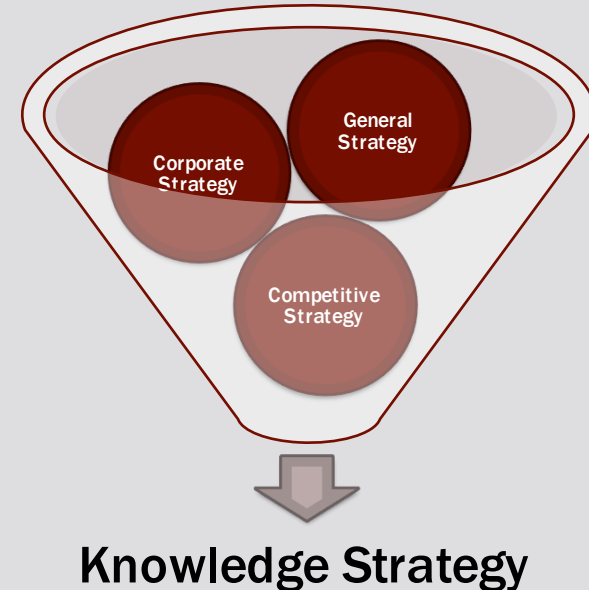
We use *management* to control *how* what we want to get done gets done.

We use *leadership* to *provide guidance* and *direction* to ensure that what we want to get done gets done.



# KNOWLEDGE STRATEGY

...the management discipline that ensures organizational effectiveness (**read: business success/organizational success**) by matching intellectual capital management with the corporate or organizational mission.



# MANAGEMENT AND KNOWLEDGE SERVICES

**Management**: the organizational function that uses available resources efficiently and effectively to ensure that the organization's goals and objectives are achieved.

How well information and knowledge are managed impacts organizational effectiveness (a.k.a. "organizational success," or "the achievement of the corporate mission").

We learn to apply management and leadership principles to our organization's quest for excellence in knowledge development, knowledge sharing, and knowledge utilization (KD/KS/KU).

# LEADERSHIP AND KNOWLEDGE LEADERSHIP

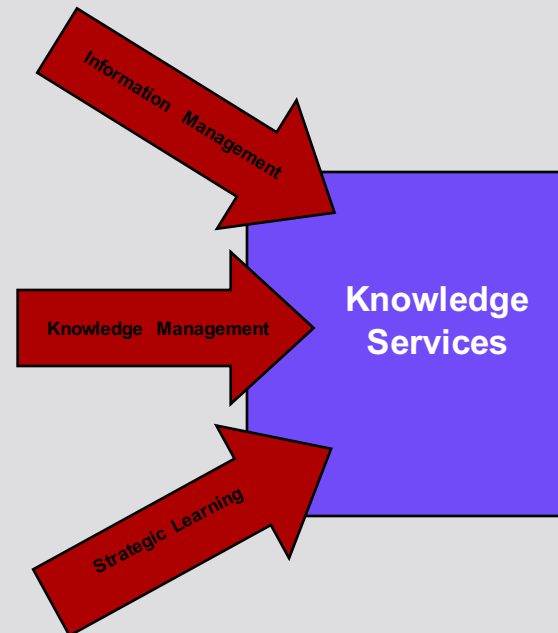
- **Leadership**: ... a process of social influence, which maximizes the efforts of others, towards the achievement of a goal.

—Kevin Kruse, *Forbes* April 9, 2013

- **Leadership styles**: The knowledge strategist emphasizes two types of leadership:
  - transformational
  - visionary
- **The knowledge strategist as leader**: a single primary responsibility—actually a two-part responsibility: to define the knowledge culture for the larger enterprise and to pave the way for restructuring the enterprise as a knowledge culture (or strengthening it, if it already exists).

## DEFINING KNOWLEDGE SERVICES (1)

Knowledge services is the management and service-delivery methodology that converges information management, knowledge management, and strategic learning into a single overarching operational function.



## THE KNOWLEDGE SERVICES / LIBRARIANSHIP CONNECTION

...library science has broadened to embrace information science, using many of the organizational principles developed earlier as library science and now concerned with gathering and manipulating and storing and retrieving and classifying any form of information that has been recorded, in any format. But that simple transition is not enough now, for the modern seeker of knowledge wants more, to identify not only what has been captured and recorded but how it has been (or can be) used. Such an expanded and anticipated objective has brought about an even further broadening, if you will, of library and information science. Today we speak of librarianship, information management, knowledge management, and their overarching connection with learning, and we gather this entire realm of knowledge seeking into the discipline of knowledge services. This new discipline—the convergence of librarianship, information management, knowledge management, and learning—builds on the basic foundations of library science—as a *science* for the organization of knowledge—to lead the user in his or her quest.

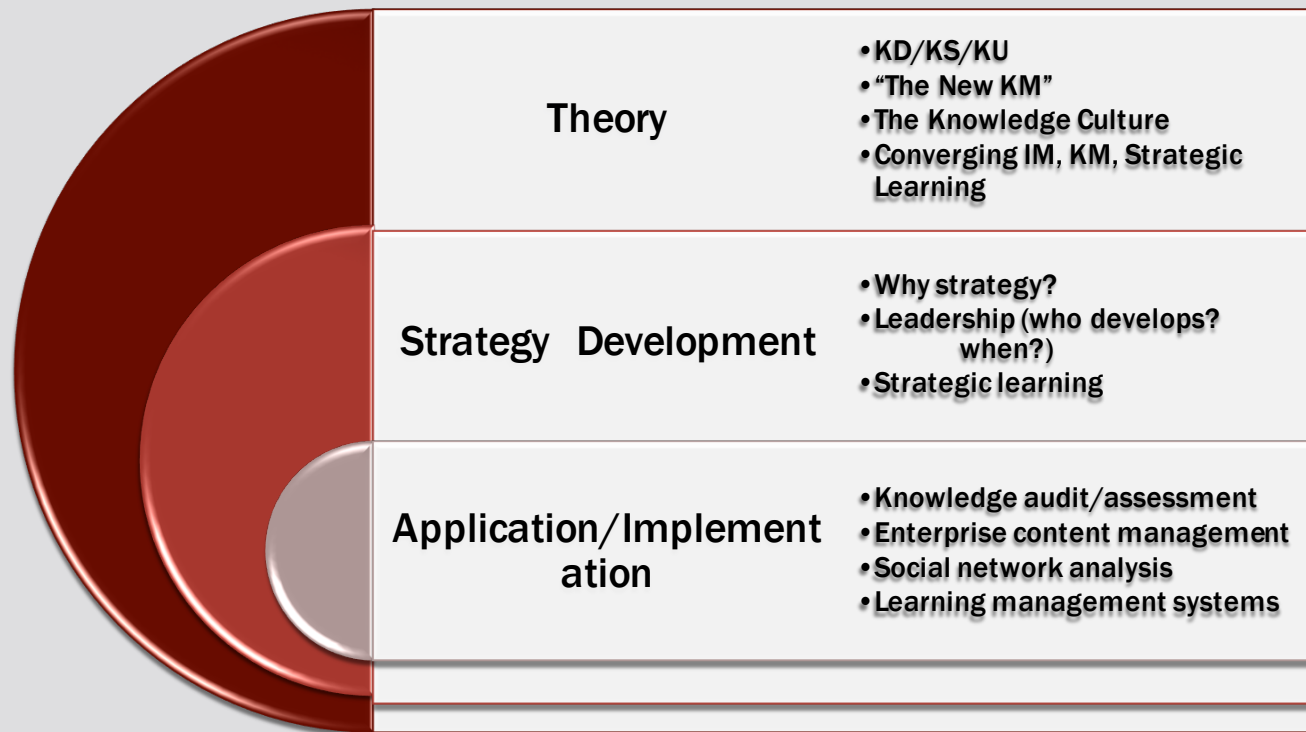
St. Clair, Guy. "Preface." *Bibliothekswissenschaft—quo Vadis? Library Science—quo Vadis? A Discipline between Challenges and Opportunities*. Munich: De Gruyter, 2005.

## 2. KD/KS/KU

Knowledge  
Development/  
Knowledge  
Sharing/  
Knowledge  
Utilization



# THE KNOWLEDGE SERVICES FRAMEWORK



# THE KNOWLEDGE SERVICES FRAMEWORK

In KM, knowledge services, and knowledge strategy development:

- The theoretical, where the people working in the discipline deal with defining – and often teaching about – information management, KM, and strategic learning
- In the strategy area (that is, strategy development), people are knowledgeable of the discipline and principles of modern KM and knowledge services and can transition knowledge services theory into strategies that are relevant to their organizations.
- In application and implementation, knowledge workers possess skills in specific techniques and applications for implementing the strategies.

## 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.

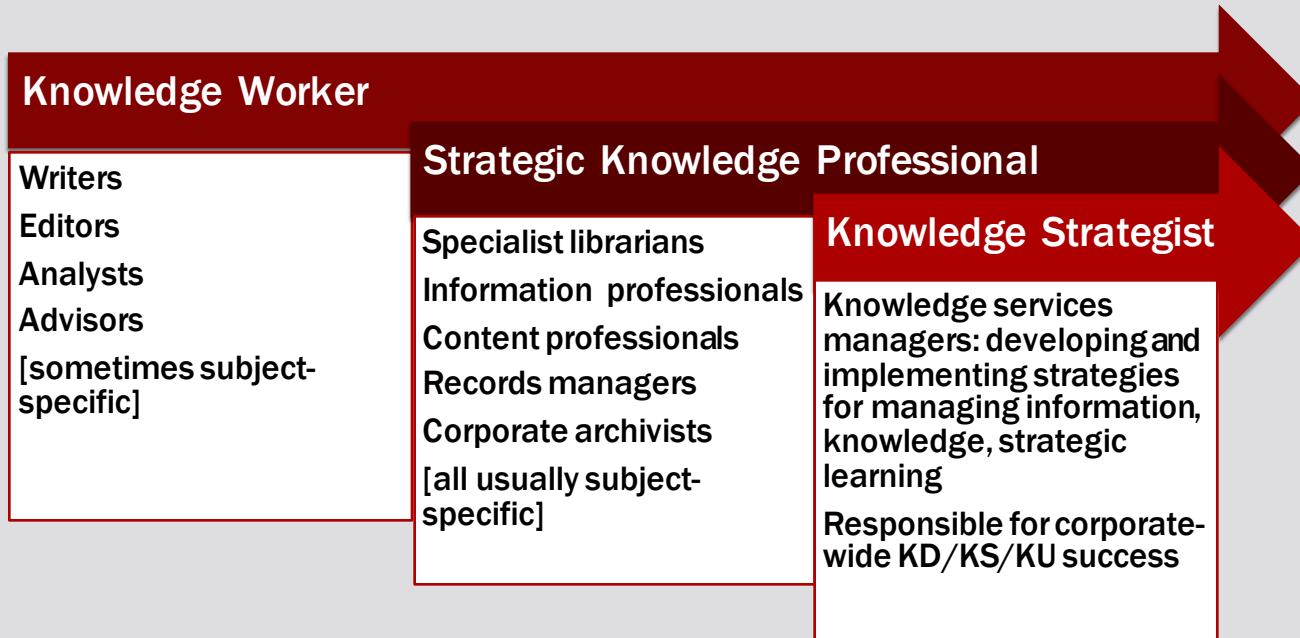
Now we speak of *Knowledge Services*, the melding of two never-very-distinct disciplines, with IM and KM converging with strategic learning to release the power of knowledge, to ensure that knowledge is utilized to achieve corporate, organizational, or institutional goals.

# INFORMATION MANAGEMENT AND KM

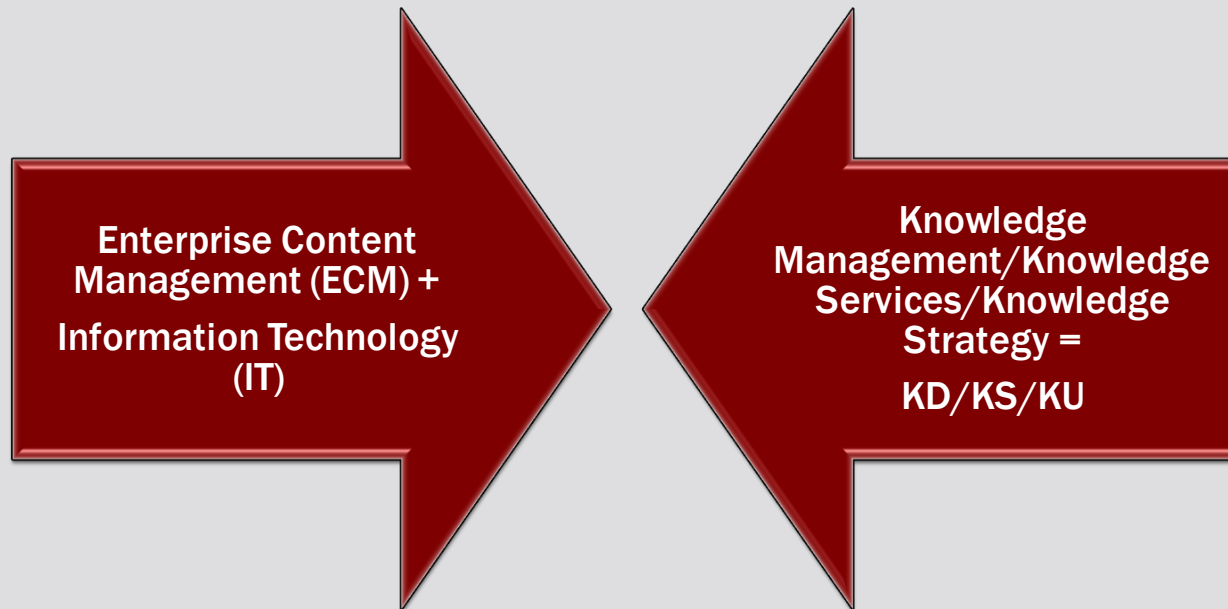


Photo: Kentv

# THE CHANGING KNOWLEDGE SERVICES WORKPLACE



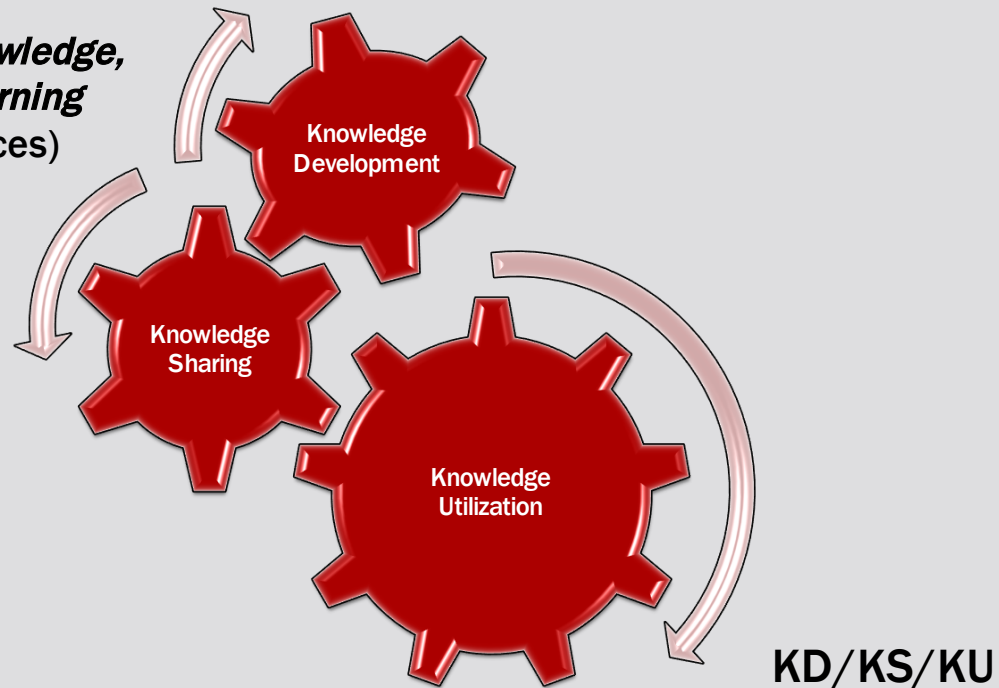
# THE CHANGING TECHNOLOGY MANAGEMENT/ KNOWLEDGE SERVICES WORKPLACE



# PUTTING KNOWLEDGE SERVICES TO WORK

Our Day-to-Day Workplace  
Framework:

***Information, Knowledge,  
and Strategic Learning***  
(Knowledge Services)



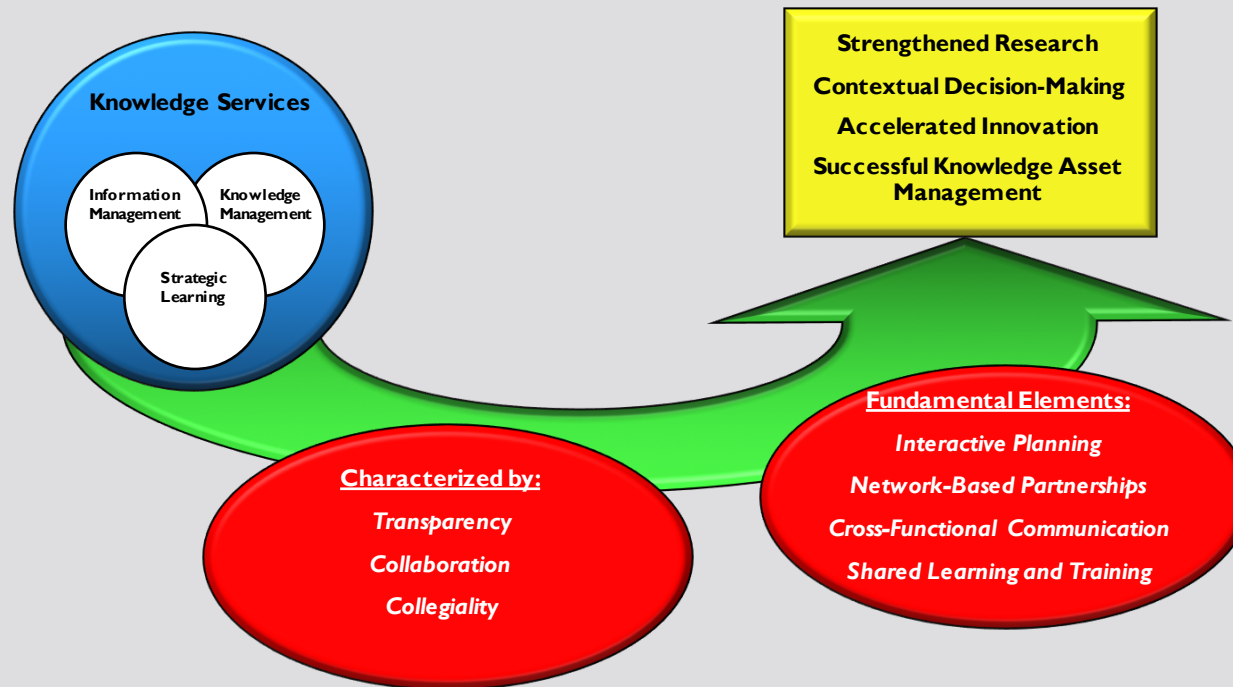
## DEFINING KNOWLEDGE SERVICES (2)

- The old model of information flowing from a central source, mediated by an information or research professional, and parceled out to end-users as needed is gone for good.
- End-users, whether they be students or faculty, researchers, marketers, or corporate strategists, are comfortable accessing their own information, using information that comes from myriad sources, and viewing content as dynamic—something to share, dissect, augment, or repurpose—and to be available on multiple platforms simultaneously. ...
- Having social media tools for internal knowledge sharing in many organizations further fosters the knowledge management model, although it differs in every enterprise depending on its internal DNA.
- In many ways, this is a more mature model for how institutions today deal with **information—a combination of developing, curating, sharing, and implementing information and expertise from internal and external sources.**

—Hydock, Jim. “SLA: Standing at the Crossroads.” Web log post. *Outsell Inc.*



## DEFINING KNOWLEDGE SERVICES (3)



The slide features two large, solid-colored rectangular blocks. The left block is red and contains the main title text. The right block is dark gray and is empty.

### **3. DEVELOPING THE KNOWLEDGE SERVICES STRATEGY**

## DEVELOPING THE KNOWLEDGE SERVICES STRATEGY

**A structured agenda for using knowledge services to transition the specialized library into the organizational knowledge center. Specific details include:**

- 1. Identifying the general philosophical approach to KM/knowledge services throughout the enterprise.**
- 2. Establishing the presence (or lack) of a leadership team of knowledge thought leaders**
- 3. The commitment of enterprise leadership to the support of a knowledge-centric, opportunity-focused and results-focused organizational management structure.**

# THE KNOWLEDGE SERVICES AUDIT

## Imagining the Future

### *How Well is Knowledge Shared? How Well Can Knowledge Be Shared?*

The knowledge services audit is a systematic examination and evaluation of an organization's explicit and tacit knowledge assets ("knowledge resources"), in this case, those of the company or organization being examined. The main objectives of the knowledge services audit are to:

- (1) to determine what knowledge is required by staff
- (2) to identify how information and knowledge are used, and
- (3) to establish the extent to which this knowledge use contributes to meeting the organization's objectives

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

*Knowledge Strategy: Building the Knowledge Network for Sustainable Urbanization*  
UN-HABITAT: United Nations Human Settlements Programme, Nairobi, 2010

# THE KNOWLEDGE SERVICES AUDIT

## Imagining the Future

### *Connecting Knowledge Services to the Organizational Mission*

- The Vision Statement: an image in words of what success will look like
- The Mission Statement: communicates the essence of the organization – why it exists
- The Values Statement: the principles or beliefs which guide stakeholders as they pursue the organization's purpose

- Michael Allison and Jude Kaye  
*Strategic Planning for Nonprofit Organizations*

# THE KNOWLEDGE SERVICES AUDIT: VISIONING AND STRATEGY DEVELOPMENT

## Vision

What Success  
Will Look Like

Flexible  
Sometimes  
Changes

## Mission

What We Do

Can Change But  
Not Often

## Values

How We Behave  
Along the Way

Do Not  
Change

# THE KNOWLEDGE SERVICES AUDIT

## Question 1: What Is Our Mission?

1. What is the current mission?
2. What are our challenges?
3. What are our opportunities?
4. Does the mission need to be revisited?



# THE KNOWLEDGE SERVICES AUDIT

## Question 2: Who Is Our Customer?

1. Who is our primary customer?
2. Who are our supporting customers?
3. How will our customers change?

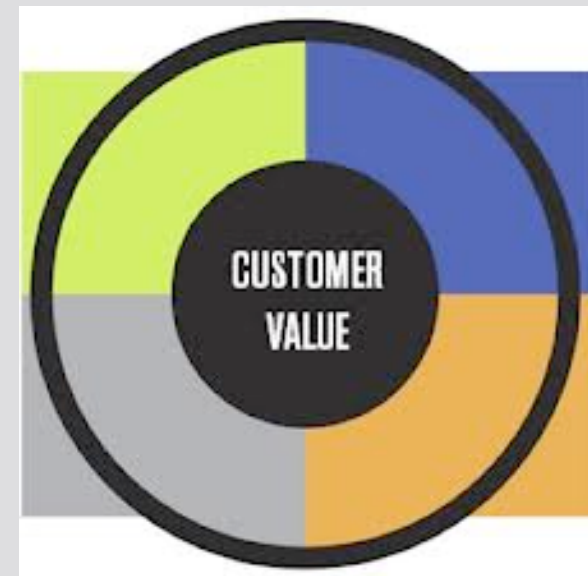




# THE KNOWLEDGE SERVICES AUDIT

## Question 3: What Does The Customer Value?

1. What do we believe our primary and supporting customers value?
2. What knowledge do we need to gain from our customers?
3. How will I participate in gaining this knowledge?



# THE KNOWLEDGE SERVICES AUDIT

## Study Question

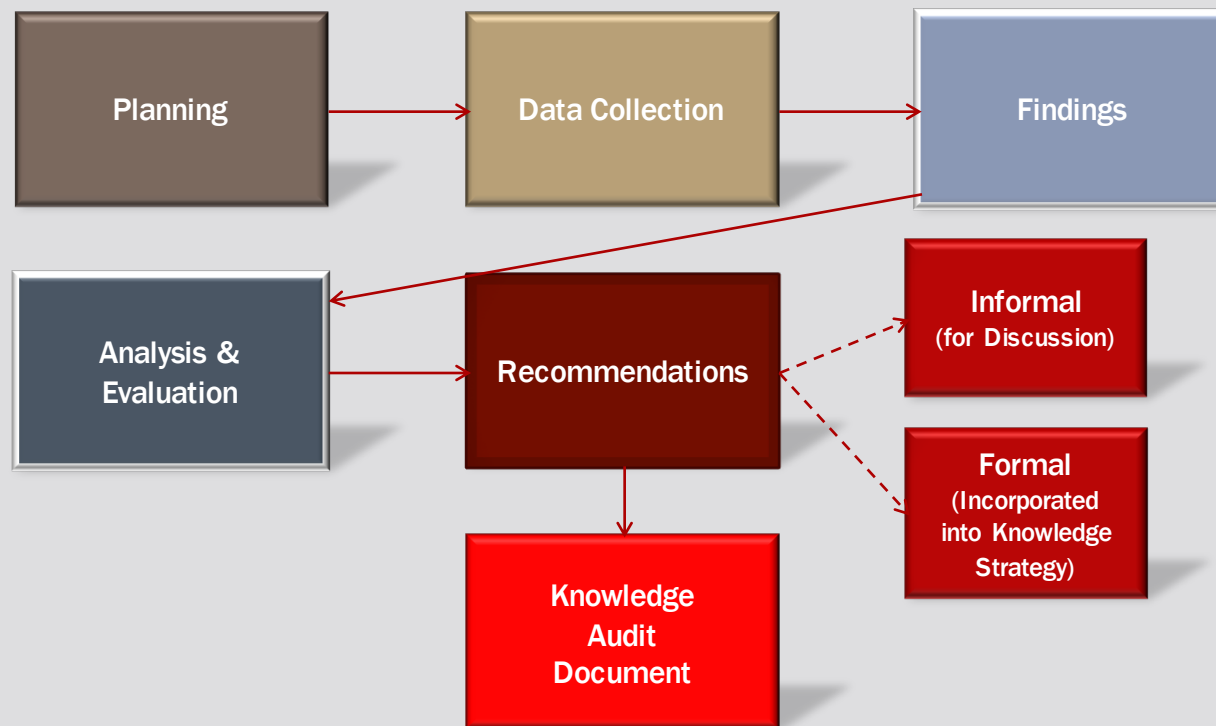
Address the three questions Peter Drucker poses for you as you begin your study of your employing organization's knowledge services framework. Based on what you have learned about the knowledge services audit:

Turn to the person next to you and address one of the questions (and its sub-questions).

How do you determine the answer to the question?

Write out your answer.

# THE KNOWLEDGE SERVICES AUDIT



## **4. THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK**

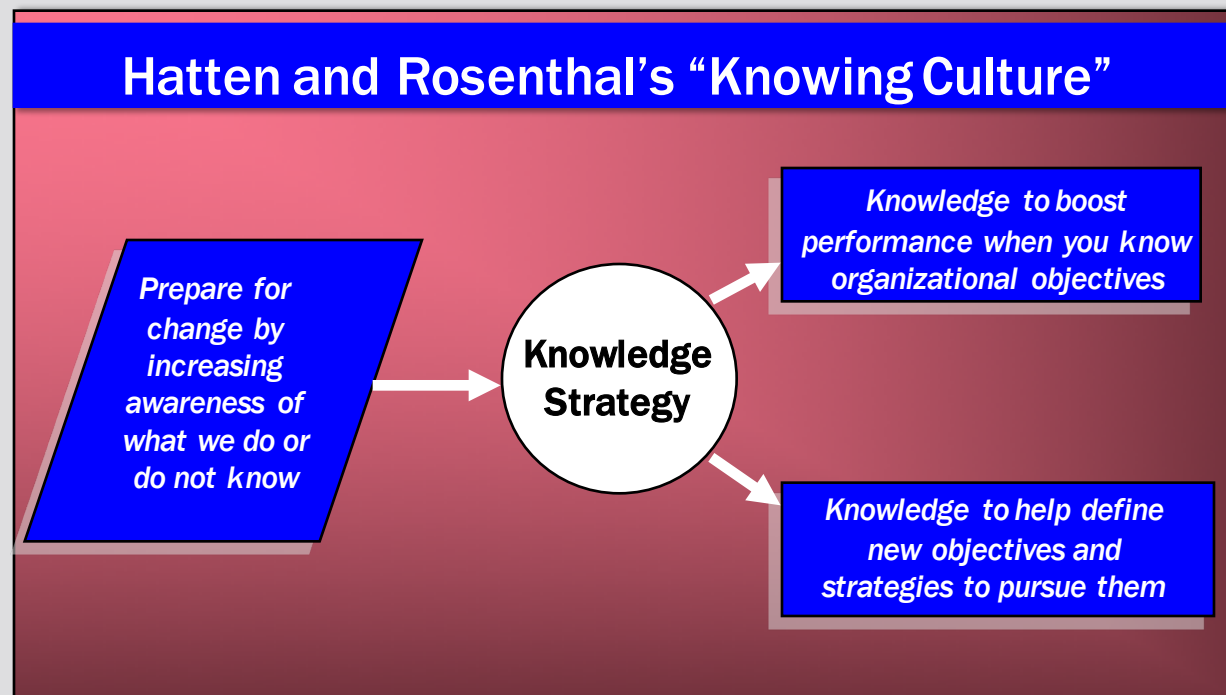
Your Practical  
“Road Map”

# THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK

**Exploration of how specialist librarians and other knowledge-focused staff can lead the implementation of knowledge services in the workplace:**

- 1. Defining the purpose and goals of a knowledge service framework**
- 2. Establishing how other initiatives have been successfully undertaken within the organization**
- 3. Determining the availability of sponsorship for a move to knowledge services as a management methodology**
- 4. Determining the outlook and feasibility for change management in the organization**
- 5. Identifying the organizational knowledge culture**
- 6. Identifying available resources.**

# THE KNOWLEDGE CULTURE (THE “KNOWING CULTURE”)



# 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 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)



# THE KNOWLEDGE STRATEGIST'S OPPORTUNITY

As the company's knowledge strategist, your management/leadership responsibilities include:

- Anticipating the future (and shaping it)
- Managing/leading current, day-to-day operations
- Establishing the knowledge objective
- Deciding on a management approach
- Working with enterprise leaders to determine strategic direction
- Determining KM/knowledge services goals and expectations
- Incorporating change management/change implementation into the organizational operational function



# THE KNOWLEDGE STRATEGIST'S OPPORTUNITY

## Six Leadership Principles (Dr. Lee Igel):

- Focus on what needs to be done
- Focus on values as the dominant chord
- Identify and respond to your professional “defining moment”
- Put the emphasis on learning over metrics
- Embrace continuous learning and how it embraces mobile knowledges
- Conserve what works and abandon what doesn't

Igel, Lee. “Six Core Principles for Creating Strong Physician Leaders,” *Physician Executive Journal* May/June 2012



# THE KNOWLEDGE SERVICES STRATEGIC FRAMEWORK: YOUR PRACTICAL “ROAD MAP”

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. Conduct the knowledge audit
8. Develop a corporate/organizational knowledge strategy
9. Establish the connection between strategic planning and the management of knowledge-focused strategic issues
10. Set up your metrics

St. Clair, Guy. “Starting KM in Your Organization:  
Here's Your Strategic Road Map”  
*SMR International Special Report*, January 2012  
<http://bit.ly/1OumX5w>

# **YOUR KNOWLEDGE SERVICES STRATEGIC FRAMEWORK**

## **Wrap-Up Discussion**

**Review the previous three slides.**

**Groups One and Four: Discuss the responsibilities of the knowledge strategist.**

**Groups Two and Five: Discuss Dr. Igel's six leadership principles.**

**Groups Three and Six: Discuss the knowledge services strategic framework practical "road map."**

**Within each group, identify the items which you think are the most important.**

**Discuss these in terms of knowledge services in your organization. Your group's facilitator will describe your discussion at the end of the session.**

# **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)

# 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)

# THANK YOU

- Guy St. Clair is Lecturer in Knowledge Services in the Postbaccalaureate Studies Program at Columbia University in the City of New York. He is also President and Consulting Specialist for Knowledge Services for SMR International, a management consulting practice headquartered in New York.
- In 2004 he was the recipient of the John Jacob Astor Award, for which he presented the workshop "From Librarianship to Knowledge Services: Managing the Specialized Library in the Knowledge-Centric Workplace." He was the author in 2013 of "From Specialized Librarianship to Knowledge Strategy: Observations on a New Direction for Information Professionals" (<http://bit.ly/1XcdMO0>), prepared for the Checkpoint Charlie Foundation of Berlin, the sponsor of the John Jacob Astor Award.
- Guy is the author of *Knowledge Services: A Strategic Framework for the 21<sup>st</sup> Century Organization*, to be published in September 2016 by De Gruyter.