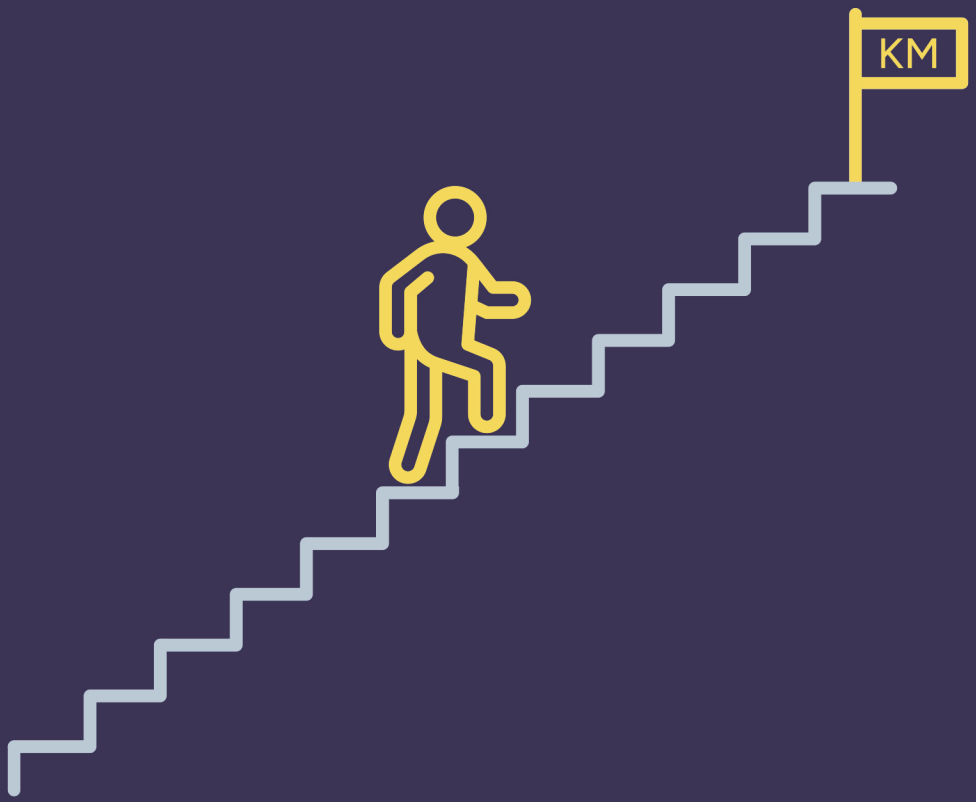
STAN GARFIELD

12 Steps to KM Success:

A GUIDE TO IMPLEMENTING KNOWLEDGE MANAGEMENT



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12 Steps to KM Success: A Guide to Implementing Knowledge Management

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Contents

Introduction

Dedication

This book about twelve steps is dedicated to twelve thought leaders: Chris Collison, Tom Davenport, Steve Denning, Nancy Dixon, Sue Hanley, Patrick Lambe, Nick Milton, Carla O'Dell, Kate Pugh, Dave Snowden, Tom Stewart, and David Weinberger. These KM visionaries were major influences on my thinking and development in the field of knowledge management. I am also fortunate to be able to call them my friends.

Acknowledgements

I wish to thank Lucidea for their long-time support of my writing. I also greatly appreciate my editor, Sarah Nichols, for our ongoing collaboration.

Background

This is my 30th year in field of knowledge management. In 1996, I was asked by the senior vice president of my business unit to start a knowledge management program after we visited Ernst & Young's Center for Business Knowledge in Cleveland, Ohio. When he heard that Ernst & Young had a Chief Knowledge Officer, he turned to me and said, "I want you to be our CKO." This made it sound simple, but it turned out that a lot of time and effort were needed to get DEC's KM program off the ground.

Along the way, I had to endure many ups and downs, enlist allies in the cause to join my virtual team, get executive sponsorship from a succession of leaders, increase investment and commitment to the program, deal with constant organizational change, adjust to changing technology, migrate from and integrate with legacy software, exercise diplomacy with many other groups, and cope with two large-scale corporate mergers.

Much of knowledge management has stayed the same during the past thirty years. The fundamental goals have not changed, the challenges are much the same, and the basic categories of people, process, and technology still apply. What has changed is the technology, the acceptance of KM as a strategic initiative, and the willingness of organizations to assign people to dedicated knowledge management roles.

We still struggle to get people to spend time sharing and reusing knowledge, it can still be hard to find information at the time of need, and expense budgets are still tight. But there are more people practicing KM today and there are powerful technologies that better address existing requirements and enable new capabilities.

The future challenges for knowledge management include creating new knowledge to stimulate innovation, expanding and better exploiting people networks, making it easier to find information when it is needed for better decision making, and effectively incorporating artificial intelligence (AI) by developing practical use cases. Knowledge management is here to stay, and by applying its fundamental concepts of learning from experience, reusing good ideas, and avoiding past mistakes, KM practitioners can ensure that their initiatives will succeed.

Definitions

When I tell people that my field is called knowledge management, most of them have not heard of it before. I explain that knowledge management allows people in an organization to become aware of what others have already learned and done. This allows them to innovate and avoid reinventing the wheel or making the same mistakes twice.

I also coined the aphorism "knowledge management doesn't happen until somebody reuses something."

When asked for more formal definitions, I use this one for knowledge, often attributed to Peter F. Drucker:

- The knowledge that we consider knowledge proves itself in action. What we now mean by **knowledge is information in action**, information focused on results.

And this for knowledge management (KM) from Ellen Knapp, former Chief Knowledge Officer of Coopers & Lybrand:

- Knowledge management is the art of transforming information and intellectual assets into enduring value for an organization's clients and its people.

I add these statements about KM:

- The purpose of knowledge management is to foster the reuse of intellectual capital, enable better decision making, and create the conditions for innovation.
- KM provides people, processes, and technology to help knowledge flow to the right people, at the right time, so they can act more efficiently, effectively, and creatively.
- Knowledge management enables Sharing, Innovating, Reusing, Collaborating, and Learning.
    1. ***Share*** what you have learned, created, and proved to allow others to learn from your experience and reuse what you have already done. This provides a supply of knowledge.
    2. ***Innovate*** to be more creative, inventive, and imaginative, resulting in breakthroughs from bold new ways of thinking and doing. This creates new knowledge.
    3. ***Reuse*** what others have already learned, created, and proved to save time and money, minimize risk, and be more effective. This creates demand for knowledge.
    4. ***Collaborate*** with others to yield better results, benefit from diverse perspectives, and tap the experience and expertise of many other people. This allows knowledge to flow at the time of need, creates communities, and takes advantage of the strength in numbers.
    5. ***Learn*** by doing, from others, and from existing information so you can perform better, solve and avoid problems, and make good decisions. Learning is the origin of knowledge.

Reasons for Starting a KM Program

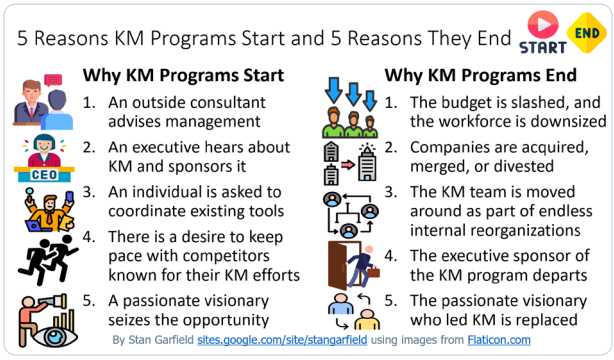
Why do organizations undertake a knowledge management initiative? Here are five reasons:

1. An **outside consultant** advises management to formally share knowledge, build communities of practice, create a knowledge repository, or undertake some other initiative that is in vogue such as Generative AI (GenAI). Management has decided to take this advice and assigns someone to get it started, who is told to work with the consultant as the internal program manager.
2. A *senior leader* heard or read about knowledge management or artificial intelligence and thinks their organization should be doing it. A person or team is given the task of investigating it further.
3. An organization has some *knowledge-sharing processes or tools* and wants to coordinate them into a coherent program. An individual volunteers or is asked to take the lead.
4. ***Competitors*** are known for their KM efforts, and an organization wants to keep up with them. A senior leader challenges someone to come up with an initiative as good as or better than what the competition is doing.
5. Members of an organization *have complained* that it is difficult to share what they know, innovate or invent, find information or locate content to reuse, collaborate with colleagues, or learn from others. A *visionary* who is passionate about improving on the status quo takes on the challenge of addressing these concerns.

Reasons KM Programs End

Why do organizations abandon knowledge management? Here are five reasons:

1. The budget is slashed, and the workforce is downsized.
2. Companies are acquired, merged, or divested.
3. The KM team is moved around as part of endless internal reorganizations.
4. The executive sponsor of the KM program departs.
5. The passionate visionary who led KM is replaced.



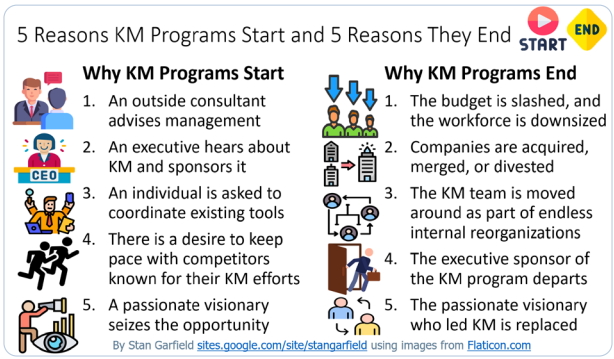
How to Use This Book

This book has two dozen chapters. The first dozen are the 12 steps to follow in implementing knowledge management. The second dozen consist of practical advice and in-depth recommendations.

Regardless of whether you are starting from scratch, taking over an existing program, or adjusting your current KM efforts, this book can help. When initiating a new program, try following the twelve steps, not necessarily in order but in whatever sequence makes the most sense. For existing initiatives, focus on the steps that may have been missed or that might not have been executed effectively.

Chapter 1 offers links to carefully curated lists of resources for learning, problem solving, and assistance. These provide a wealth of additional information for every stage of a KM program. Chapters 2-12 cover the rest of the twelve steps to success.

Chapters 13 through 24 contain useful insights, priorities, issues, lessons learned, knowledge nuggets, maxims, pitfalls to avoid, and proven practices. These are based on my 30 years as a practicing knowledge manager and can be applied to help make a KM program even more successful.



Chapter 1: Learn About the Field

STEP 1: Learn as much as you can about the field of knowledge management. Take advantage of the abundance of helpful resources that are readily available.

Before starting a knowledge management initiative, you should learn more about the field. To start, read books, periodicals, and blogs; visit websites: attend training and conferences; listen to podcasts; view videos and webinars; and participate in professional communities to deepen your understanding of the field of knowledge management. Learning, building expertise, and seeking outside help will allow you to benefit from the experience of others, reuse the best ideas, and avoid the usual pitfalls.

The links below will lead you to lists of books to read, periodicals to which you can subscribe, websites to visit; conferences to attend, training to take, podcasts to listen to, videos to watch, communities to join, mentors to seek out, consultants to engage, and thought leaders to follow.

It's a good idea to attend a KM conference before starting a KM program. After that, try to attend one every year, choosing a different one as often as possible.

Many conferences feature training before, during, or after the event. Take advantage of this whenever possible. Other sources of training include online courses, vendor offerings, and university programs.

When attending conferences and training courses, make every effort to get to know the other attendees. Seek them out during meals, breaks, and social events. Ask them questions, share your thoughts, and exchange contact information. Try to schedule visits with the most energetic colleagues to learn more about their KM programs.

For KM communities, start by reading any discussions, and then post questions. If events are held, try to attend, especially face-to-face events.

Listening to KM podcasts allows you to learn while walking, driving, running, or just sitting. These interviews with KM thought leaders provide insights in an hour or less of your time.

Seeking a KM mentor is a great way to learn from someone who has experience from which you can benefit. You can apply to the KM Peer Mentoring Program run by the SIKM Leaders Community and KM4Dev Community. Or you can seek your own from the list of KM thought leaders. See Chapter 23 for details.

If you have the funds to engage an outside consultant, you can benefit from their knowledge and experience. If not, you can still learn from visiting their websites and reading their literature and publications.

Learning about the field of KM is an ongoing responsibility. There is a great amount of content to digest, and new material is published every day. Start with a simple goal such as reading one book or attending one conference, accomplish it, and then set your next goal. As you learn more, it will become easier to tackle each successive step.

KM Resources

Follow these links to lists, blog posts, articles, presentations, videos, and other sources of useful knowledge.

10 Compilations

1. KM Resources https://lnkd.in/gyQQdrzY
2. 100 KM Resources https://lnkd.in/enTC_xG
3. Maxims for Innovation, Leadership, and Knowledge https://lnkd.in/e3-wvje
4. Q&A on Collaboration & Communities https://lnkd.in/eitFpiX
5. Knowledge Nuggets https://lnkd.in/es3wuRG
6. 30 KM Insights https://lnkd.in/bHE9S-z
7. KM Visions https://lnkd.in/eYTsSz5
8. KM Sins, Pitfalls, Mistakes, and Causes of Failure https://lnkd.in/exkv3Nb
9. KM Myths https://lnkd.in/eRBxV7k
10. 100 Knowledge Management Specialties, 50 KM Components, and 50 Alternative Names for KM https://lnkd.in/bY6bNra

16 Collections of Articles, Presentations, and Videos

1. Knowledge Management Videos and Workshops https://lnkd.in/e-wRfxV
2. Articles about Webinars, Calls, Videos, Podcasts, and Recordings https://lnkd.in/edG7BvE
3. Articles and Presentation about Leadership https://lnkd.in/e7hj2vG
4. Articles about Communications, Grammar, and English Usage https://lnkd.in/e57cJxj
5. Articles and Presentations about Culture https://lnkd.in/g23sjGfD
6. Articles and Presentations about Enterprise Social Networks https://lnkd.in/eKMkvfh
7. Articles and Presentations About Communities of Practice and Community Management https://lnkd.in/eKMkvfh

8. Articles and Presentations about Content https://lnkd.in/ebtYtQ9
9. Articles and Presentations about Collaboration https://lnkd.in/e-mgQgu
10. Articles and Presentations about Social Media https://lnkd.in/eCKDKD6
11. Articles and Presentations about Innovation https://lnkd.in/gw39f3n5
12. Articles on Goals, Measurements, Metrics, Reports, and Analytics https://lnkd.in/gTZ8TS_K
13. Articles about the 50 KM Components https://lnkd.in/ebhaQdJ
14. People Components https://lnkd.in/eHyNnGr
15. Process Components https://lnkd.in/enRxSmb
16. Technology Components https://lnkd.in/eMYxvDS

21 Curated Lists

1. Awards https://lnkd.in/ddNbaWY
2. Blog Posts https://lnkd.in/gQ8-pG7z
3. Blogs https://lnkd.in/e7B52pg
4. Books https://lnkd.in/eS6DPfz
5. Communities https://lnkd.in/ewCS7Vy
6. Component and Specialties https://lnkd.in/bY6bNra
7. Conferences https://lnkd.in/etcSzqf
8. Consultants https://lnkd.in/eCtrsK6
9. Definitions https://lnkd.in/gBAtHUQb
10. History https://lnkd.in/gpMMRN-2
11. Infographics https://lnkd.in/gYTAdbrv
12. Insights, Articles, Book Reviews, Recordings, and Interviews https://lnkd.in/eGG-qyX
13. Maxims https://lnkd.in/dQKehTv
14. Periodicals https://lnkd.in/ecRJxuN
15. Q&A https://lnkd.in/gurdh6zz
16. Quotes https://lnkd.in/gB3wGtsc
17. Recommendations https://lnkd.in/geCkDCnS
18. Sites https://lnkd.in/eecBdK9
19. Thought Leaders https://lnkd.in/eKbcuHJ
20. Topics https://lnkd.in/gQMYFyU
21. Training, Podcasts, Videos, Webinars https://lnkd.in/eFJ4nKD

Resource Recommendations

Here are recommendations for each key type of resource. Detailed descriptions are then provided for selections from each category.

Books

1. Verna Allee - *The Future of Knowledge: Increasing Prosperity through Value Networks*
2. Johel Brown-Grant - *Knowledge Management and the Practice of Storytelling: The Competencies and Skills Needed for a Successful Implementation*
3. Shawn Callahan - *Putting Stories to Work*
4. Chris Collision and Geoff Parcell - *Learning to Fly: Practical Knowledge Management from Leading and Learning Organizations*
5. Kimiz Dalkir - *Knowledge Management in Theory and Practice, Fourth Edition*
6. Thomas Davenport and Laurence Prusak: *Working Knowledge: How Organizations Manage What They Know*
7. Stephen Denning - *The Leader's Guide to Storytelling: Mastering the Art and Discipline of Business Narrative*
8. Nancy Dixon - *Common Knowledge: How Companies Thrive by Sharing What They Know*
9. Seth Earley - *The AI-Powered Enterprise: Harness the Power of Ontologies to Make Your Business Smarter, Faster, and More Profitable*
10. Seth Godin - *Tribes: We Need You to Lead Us*
11. Morten Hansen - *Collaboration: How Leaders Avoid the Traps, Build Common Ground, and Reap Big Results*
12. Ed Hoffman, Matthew Kohut, and Laurence Prusak - *The Smart Mission: NASA's Lessons for Managing Knowledge, People, and Projects*
13. Patrick Lambe - *Organising Knowledge: Taxonomies, Knowledge and Organisational Effectiveness*
14. Frank Leistner - *Mastering Organizational Knowledge Flow: How to Make Knowledge Sharing Work*
15. Dorothy Leonard, Walter Swap, and Gavin Barton - *Critical Knowledge Transfer: Tools for Managing Your Company's Deep Smarts*
16. Nick Milton and Patrick Lambe - *The Knowledge Manager's Handbook: A Step-by-Step Guide to Embedding Effective Knowledge Management in your Organization*
17. Carla O'Dell and C Jackson Grayson - *If Only We Knew What We Know: The Transfer of Internal Knowledge and Best Practice*
18. Anthony J. Rhem - *Knowledge Management in Practice*
19. Melissie Rumizen - *Complete Idiot's Guide to Knowledge Management*
20. Arthur Shelley - *KNOWledge SUCCESSion: Sustained Performance and Capability Growth Through Strategic Knowledge Projects*
21. George Siemens - *Knowing Knowledge*
22. Dave Snowden - *Cynefin - Weaving Sensemaking into the Fabric of Our World*
23. Thomas A. Stewart - *The Wealth of Knowledge: Intellectual Capital and the Twenty-first Century Organization*
24. Zach Wahl and Joseph Hilger - *Making Knowledge Management Clickable: Knowledge Management Systems Strategy, Design, and Implementation*
25. David Weinberger - *Too Big To Know: Rethinking Knowledge Now That the Facts Aren't the Facts, Experts Are Everywhere, and the Smartest Person in the Room Is the Room*
26. Etienne Wenger-Trayner, Richard McDermott, and William M. Snyder - *Cultivating Communities of Practice*

In addition, you can read my previous books, four of which are available at no charge from Lucidea:

1. *Proven Practices for Promoting a Knowledge Management Program* (2017)Lucidea Press
2. *Handbook of Community Management: A Guide to Leading Communities of Practice* (2020) De Gruyter Brill
3. *The Five Cs of KM* (2022) Lucidea Press
4. *Knowledge Nuggets: 100 KM Infographics* (2023) Lucidea Press
5. *Profiles in Knowledge: 120 Thought Leaders in Knowledge Management* (2024) Lucidea Press

Blogs

1. APQC
2. Mary Abraham: Above and Beyond KM
3. Shawn Callahan et al.: Anecdote
4. Ross Dawson
5. Seth Earley
6. Enterprise Knowledge
7. Seth Godin
8. Harold Jarche
9. Lucidea: Think Clearly
10. James Robertson: Column Two
11. Dave Snowden: Cynefin
12. David Weinberger: Perspective on Knowledge
13. Nancy White: Full Circle

Conferences

1. APQC
2. KMWorld
3. Knowledge Summit Dublin
4. Midwest KM Symposium

Podcasts

1. APQC
2. Because You Need to Know - Edwin K. Morris (archives)
3. Knowledge Cast - Enterprise Knowledge
4. Knowledge Fika - Rebecka Isaksson and Dawn Brushammar

Communities

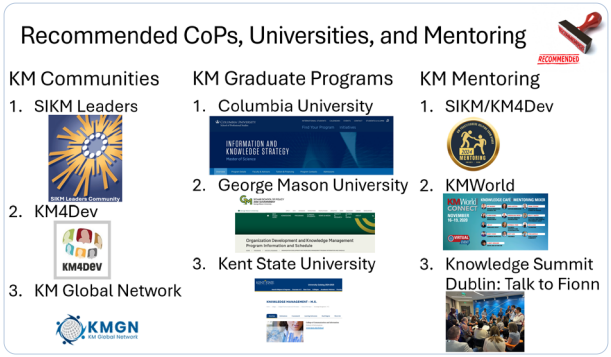
1. KM4Dev community of international development practitioners
2. KMGN (KM Global Network)
3. SIKM Leaders Community

Graduate Programs

1. Bangkok University
2. Columbia University Master of Science in Information and Knowledge Strategy (IKNS)
3. George Mason University Organization Development & Knowledge Management (ODKM)
4. Kent State University Knowledge Management

Mentoring

1. SIKM and KM4Dev: KM Peer Mentoring Program
2. KMWorld: Mentoring Morning Knowledge Café
3. Knowledge Summit Dublin: Talk to Fionn



Periodicals

1. Guided Insights Communique
2. Gurteen Knowledge Letter
3. KM4Dev Journal
4. RealKM
5. Step Two

Sites

1. APQC
2. Cynefin: Dave Snowden
3. Enterprise Knowledge: Zach Wahl
4. KMWorld
5. Knoco: Nick Milton
6. Knowledgeable: Chris Collison
7. knowledge et al: Paul Corney
8. SIRCL: Stan Garfield
9. Step Two: James Robertson
10. Working Knowledge^{CSP}: Bill Kaplan

Videos

1. ACIES Innovations
2. APQC
3. Kent State University: Kendra Albright Interviews
4. KMWorld

Webinars

1. APQC
2. Earley Information Science: Seth Earley
3. KMWorld
4. Lucidea

Training

1. APQC
2. KM Global Network
3. Working Knowledge^{CSP}

Consultants

1. 3R Knowledge Consulting - Rachad Najjar
2. Above and Beyond - Mary Abraham
3. AJRA: A.J. Rhem & Associates - Tony Rhem
4. AlignConsulting - Kate Pugh
5. Anecdote - Shawn Callahan
6. Applied Intelligence Atelier (A-I-A) - Joel Muzard
7. Applied Knowledge Sciences (AKS) - Art Murray
8. APQC
9. Common Knowledge Associates - Nancy Dixon
10. Cynefin Co - Dave Snowden
11. Dan Ranta
12. Earley Information Science - Seth Earley
13. Entelechy - Stephanie Barnes
14. Enterprise Knowledge (EK) - Zach Wahl
15. Full Circle Associates - Nancy White
16. Guided Insights - Nancy Settle-Murphy
17. Susan Hanley LLC
18. Knowledgeable - Chris Collison
19. The Knowledge Agency (TKA) - Tim Powell
20. Knowledge Associates - Ron Young
21. Knowledge et al - Paul Corney
22. Knowledge Strategies LLC - Ed Hoffman
23. Leader Networks - Vanessa DiMauro
24. Merced Group - Catherine Shinners
25. Step Two - James Robertson
26. Straits Knowledge - Patrick Lambe
27. STRAtactical LLC - John Hovell
28. Vala-Webb Consulting Inc. - Gordon Vala-Webb
29. Etienne and Beverly Wenger-Trayner
30. Wirearchy - Jon Husband
31. Working Knowledge^{CSP} - Bill Kaplan

Thought Leaders: *Profiles in Knowledge*

- Analytics and Business Intelligence
  - Thought Leader 1: Irma Becerra
  - Thought Leader 2: Tom Davenport
  - Thought Leader 3: Jeanne Harris
  - Thought Leader 4: Jay Liebowitz
- Artificial Intelligence
  - Thought Leader 5: Seth Earley
  - Thought Leader 6: Sue Feldman
  - Thought Leader 8: Rachad Najjar
  - Thought Leader 9: Kate Pugh
  - Thought Leader 10: Tony Rhem
- Big Picture
  - Thought Leader 11: Mary Abraham
  - Thought Leader 12: Alex Bennet
  - Thought Leader 13: Jo Ann Girard
  - Thought Leader 14: John Girard
  - Thought Leader 15: Murray Jennex
  - Thought Leader 16: Matt Moore
  - Thought Leader 17: Larry Prusak
  - Thought Leader 18: Madan Rao
- Collaboration
  - Thought Leader 19: Kirsimarja Blomqvist
  - Thought Leader 20: Bob Buckman
  - Thought Leader 21: Heidi Gardner
  - Thought Leader 22: Morten Hansen
  - Thought Leader 23: Elizabeth Lank
  - Thought Leader 24: Frank Leistner
  - Thought Leader 25: Dennis Pearce
  - Thought Leader 26: Nancy Settle-Murphy
  - Thought Leader 27: Arthur Shelley
  - Thought Leader 28: Catherine Shinners
- Communities
  - Thought Leader 29: Vanessa DiMauro
  - Thought Leader 30: Rachel Happe
  - Thought Leader 31: Alice MacGillivray
  - Thought Leader 32: Céline Schillinger
  - Thought Leader 33: Keeley Sorokti
  - Thought Leader 34: Luis Suarez
  - Thought Leader 35: Kaye Vivian
  - Thought Leader 36: Beverly Wenger-Trayner
  - Thought Leader 37: Etienne Wenger-Trayner
  - Thought Leader 38: Nancy White

- Conversation
  - Thought Leader 39: Nancy Dixon
  - Thought Leader 40: David Gurteen
  - Thought Leader 41: John Hovell
  - The Future
  - Thought Leader 42: Ross Dawson
  - Thought Leader 43: Art Murray
- Innovation
  - Thought Leader 44: Debra Amidon
  - Thought Leader 45: Danièle Chauvel
  - Thought Leader 46: Amy Edmondson
  - Thought Leader 47: Vincent Ribière
  - Thought Leader 48: Georg von Krogh
- Intellectual Capital
  - Thought Leader 49: Mary Adams
  - Thought Leader 50: Nick Bontis
  - Thought Leader 51: Leif Edvinsson
  - Thought Leader 52: Annie Green
  - Thought Leader 53: Gordon Petrash
  - Thought Leader 54: Hubert Saint-Onge
  - Thought Leader 55: Tom Stewart
  - Thought Leader 56: Karl-Erik Sveiby
  - Thought Leader 57: Karl Wiig
- ISO Standard
  - Thought Leader 58: Chris Collison
  - Thought Leader 59: Paul Corney
  - Thought Leader 60: Patricia Eng
  - Thought Leader 61: Nick Milton
  - Thought Leader 62: Ron Young
  - Knowledge Transfer and Retention
  - Thought Leader 63: Bill Kaplan
  - Thought Leader 64: Dorothy Leonard
  - Thought Leader 65: Moria Levy
- Learning
  - Thought Leader 66: David Bennet
  - Thought Leader 67: Helen Blunden
  - Thought Leader 68: Marcia Conner
  - Thought Leader 69: Jay Cross
  - Thought Leader 70: David Garvin
  - Thought Leader 71: Jane Hart
  - Thought Leader 72: Joitske Hulsebosch
  - Thought Leader 73: Ana Neves
  - Thought Leader 74: Michelle Ockers
  - Thought Leader 75: George Siemens
  - Thought Leader 76: Eric Tsui
- Networks
  - Thought Leader 77: Verna Allee
  - Thought Leader 78: Patti Anklam
  - Thought Leader 79: Rob Cross
  - Thought Leader 80: Graham Durant-Law
  - Thought Leader 81: June Holley
  - Thought Leader 82: Valdis Krebs
  - Thought Leader 83: Jessica Lipnack
  - Personal Knowledge Management
  - Thought Leader 84: Mark Britz
  - Thought Leader 85: Lilia Efimova
  - Thought Leader 86: Harold Jarche
- Search and Findability
  - Thought Leader 87: Mary Ellen Bates
  - Thought Leader 88: Agnes Molnar
  - Thought Leader 89: Peter Morville
  - Sensemaking
  - Thought Leader 90: Max Boisot
  - Thought Leader 91: Chun Wei Choo
  - Thought Leader 92: Brenda Dervin
  - Thought Leader 93: Gary Klein
  - Thought Leader 94: Dave Snowden
- Story and Narrative
  - Thought Leader 95: Madelyn Blair
  - Thought Leader 96: Johel Brown-Grant
  - Thought Leader 97: Shawn Callahan
  - Thought Leader 98: Steve Denning
  - Thought Leader 99: John Lewis
  - Thought Leader 100: Lesley Shneier
  - Thought Leader 101: Victoria Ward
- Strategy
  - Thought Leader 102: Stephanie Barnes
  - Thought Leader 103: Gloria Burke
  - Thought Leader 104: Kimiz Dalkir
  - Thought Leader 105: Mary Lee Kennedy
  - Thought Leader 106: Carla O'Dell
  - Thought Leader 107: Nirmala Palaniappan
  - Thought Leader 108: Melissie Rumizen
- Taxonomy
  - Thought Leader 109: Heather Hedden
  - Thought Leader 110: Marti Heyman
  - Thought Leader 111: Patrick Lambe
  - Thought Leader 112: Wendi Pohs
  - Thought Leader 113: Zach Wahl
- Technology
  - Thought Leader 114: Carl Frappaolo
  - Thought Leader 115: Sue Hanley
  - Thought Leader 116: Bill Ives
  - Thought Leader 117: Charlene Li
  - Thought Leader 118: Jane McConnell
  - Thought Leader 119: James Robertson
  - Thought Leader 120: David Weinberger

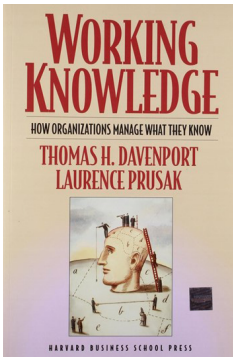
Selected Suggestions

Here are suggestions for where to start in each category:

1. Book: *Working Knowledge* by Thomas Davenport and Laurence Prusak
2. Blog: Harold Jarche
3. Conference: KMWorld
4. Podcast: Knowledge Fika
5. Community: SIKM Leaders Community
6. Graduate Programs
   - Columbia University
   - Kent State University
7. Mentoring: SIKM/KM4Dev KM Peer Mentoring Program
8. Periodical: RealKM
9. Site: SIRCL - Stan Garfield's KM Site
10. Videos: KMWorld
11. Webinars: Lucidea
12. Training: APQC

13. Consultant: Dan Ranta
14. Thought Leader: the late Larry Prusak

Here are the details on each suggestion.



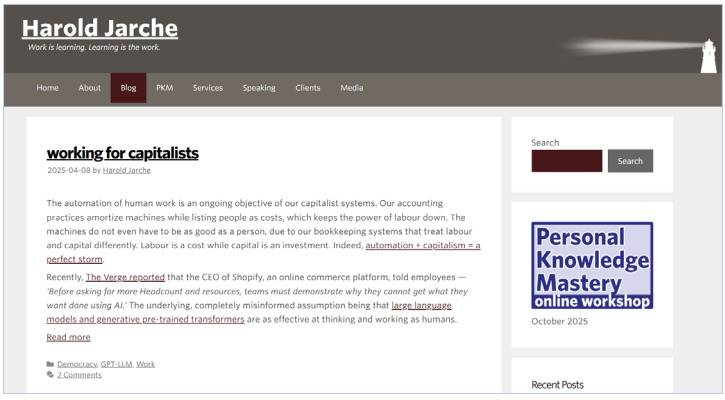
Book: *Working Knowledge: How Organizations Manage What They Know* by Thomas Davenport and Laurence Prusak a.co/d/6GzrR61

When I started the first KM program at Digital Equipment Corporation in 1996, this was the first book I read. It provided me with valuable insights, suggestions, and strategies. I have recommended it ever since.

The definitive primer on knowledge management, this influential book establishes the enduring vocabulary and concepts in the field. It serves as the hands-on resource of choice for companies that recognize knowledge as the only sustainable source of competitive advantage going forward. Drawing from their work with more than thirty knowledge-rich firms, Davenport and Prusak -- experienced consultants with a track record of success -- examine how all types of companies can effectively understand, analyze, measure, and manage their intellectual assets, turning corporate wisdom into market value. They categorize knowledge work into four sequential activities--accessing, generating, embedding, and transferring--and look at the key skills, techniques, and processes of each. While they present a practical approach to cataloging and storing knowledge so that employees can easily leverage it throughout the firm, the authors caution readers on the limits of communications and information technology in managing intellectual capital.

They consider such questions as: What key cultural and behavioral issues must managers address to use knowledge effectively? What are the best ways to incorporate technology into knowledge work? What does a successful knowledge project look like – and how do you know when it has succeeded? In the end, say the authors, the human qualities of knowledge - experience, intuition, and beliefs – are the most valuable and the most difficult to manage. Applying these insights is every manager's first step on that rewarding road to long-term success.

Blog: Harold Jarche jarche.com/blog



Harold has been blogging even longer than I have, starting in 2004 and posting over 3,600 times since then. I have been following him most of that time.

Harold Jarche works with individuals, organizations, and public policy influencers to develop practical ways to improve collaboration, knowledge sharing, and sensemaking. He has been described as "a keen subversive of the last century's management and education models". Clients appreciate Harold for his extensive experience and network. His internationally renowned blog is "a beacon of light in the dark landscape of organizational learning". According to one long-time reader, "Harold is one of the best thinkers out there on things relating to learning and work".

Harold believes we need to make social networks and communities of practice essential components of all of our workplaces. Being able to understand emerging situations, see patterns, and co-solve problems are now essential business skills. As Harold says, work is learning & learning is the work.

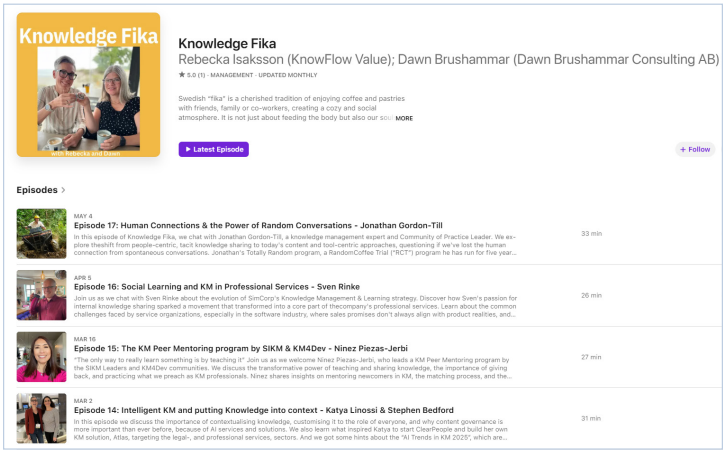
Conference: KMWorld kmworld.com/Conference

I have attended and presented at KMWorld since 2006. I recommend registering for two workshops on the first day, attending all of the keynotes, and participating in the Mentoring Morning Knowledge Café.

The world's leading knowledge management Event is held in Washington, DC every November for KMWorld where you'll get practical advice, hear inspiring thought leadership, and have access to in-depth training and workshops on how KM and related disciplines can provide enormous value for your organization.

KMWorld also hosts four highly integrated co-located events: Taxonomy Boot Camp, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World. Together, these events highlight organizations with innovative digital solutions that are shaping the future. They emphasize the importance of experimental, risk-taking approaches, demonstrate significant progress in transforming corporate cultures, and show how AI and other technologies are being applied in practical, impactful ways to drive industry advancement.

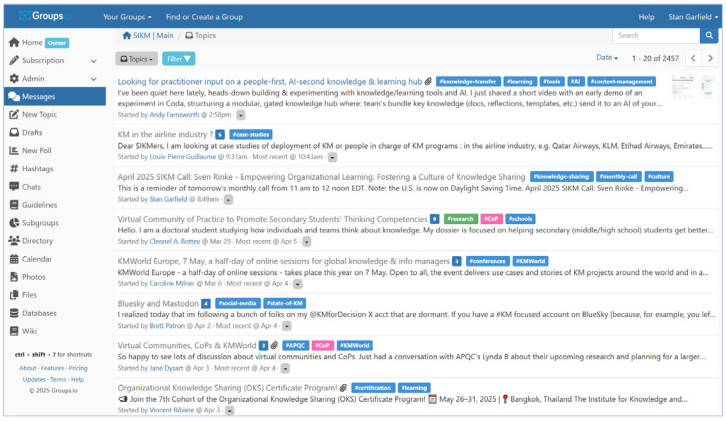
Podcast: Knowledge Fika - Rebecka Isaksson and Dawn Brushammar podcasts.apple.com/podcast/id1744394778



I have been a guest on this podcast. I subscribe and listen regularly.

Swedish "fika" is a cherished tradition of enjoying coffee and pastries with friends, family or co-workers, creating a cozy and social atmosphere. It is not just about feeding the body but also our souls and brains, when we take mini breaks throughout the day, to clear our minds and replenish. In this podcast we sit down with interesting profiles from the global knowledge management community, for casual conversations about relevant KM-topics, over a virtual cup of coffee.

Community: SIKM Leaders Community sikm.groups.io



I started this community in 2005 with 8 initial members. It has grown to over 1,275 members, held over 200 monthly calls, and had over 12,750 messages posted in its online discussions.

The SIKM Leaders Community is a global community of knowledge management practitioners, open to everyone with a legitimate interest in the field. The goal is to share experiences and insights on implementing knowledge management.

The community hosts online discussions and holds monthly calls on the third Tuesday every month at 11 am ET. Anyone who has a question about knowledge management is guaranteed to receive an answer if they post in the community's threaded discussions.

Graduate Programs

Columbia University sps.columbia.edu/academics/masters/information-knowledge-strategy-ikns

I was an adjunct instructor for this program. I presented three times at the spring residency in New York and on several online sessions.

Grounded in the field of knowledge management, Columbia's inter-disciplinary curriculum provides foundations in information science, organizational psychology, and change management as well as practical skills in project management and executive leadership to dramatically increase impact in a current organization or for a career pivot.

IKNS students train under world-class faculty, including former and current executives from Google, IBM, NASA, and Oliver Wyman. And you will join a powerful, global alum network in coveted positions, including at Alphabet, Goldman Sachs, Nike, Pfizer, and The World Bank.

The IKNS curriculum is flexible, designed to be completed by working professionals and career pivoters, and includes many elective courses that can be chosen from other graduate programs across Columbia University. The electives allow tailoring the experience to fit personal intellectual curiosity and career objectives. Study full-time or part-time at a pace of your choosing, online or in-person in New York City.

Kent State University kent.edu/iSchool/knowledge-management

I am on the advisory board for this program. I helped develop the KM curriculum.

The Master of Science degree in Knowledge Management prepares professionals to serve as leaders who guide organizations into improved performance through better use of organizational knowledge. Graduates of the program will be able to design, deliver and support knowledge management programs at the enterprise and project levels.

Organizations of all types, across all sectors of the economy, face a growing need for increased efficiencies. Gaining these efficiencies means organizations must mature into knowledge organizations by developing and applying knowledge to serve their markets better. This requires professionals with new skills and tools found in the emerging domain of knowledge management.

Students in the Knowledge Management major learn principles, values and best practices that will prepare them for leadership roles in their future careers. They learn from interaction with their instructors and student colleagues, many of whom are also professionals working in knowledge management. Through courses, internships and other opportunities, students gain real-world, practical experience in developing and applying knowledge to improve organizational strategies, processes and technical skills.

Mentoring: SIKM/KM4Dev KM Peer Mentoring Program kmpeermentoring@gmail.com

I helped plan and pilot this joint program of the SIKM Leaders Community and the KM4Dev Community. I continue to serve as a mentor to multiple mentees.

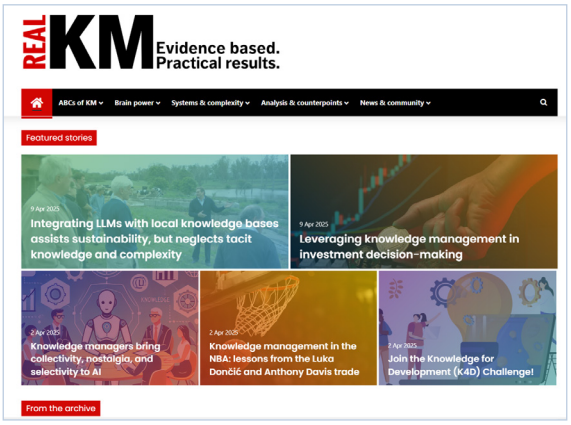
The KM Peer Mentoring Program is an annual program that takes place from March to February of the following year. It aims to provide selected mentees with 9-12 monthly, one-on-one calls, with a designated mentor, depending on the requested KM expertise. The program is led by Ninez Piezas-Jerbi.

Periodical: RealKM realkm.com

At one time there were multiple monthly magazines focused on KM. Most of these are no longer published. RealKM is a valuable online periodical edited by Bruce Boyes with support from Stephen Bounds and Arthur Shelley.

The purpose of RealKM is:

- Publishing concise, practically oriented articles to inform managers and knowledge management (KM) practitioners about the findings of high-value research and real and specific case scenarios in KM and related disciplines such as communications, marketing, psychology, biology, sociology, and management.
- Leading and supporting actions and activities that encourage and facilitate the application of these research and case scenario findings in KM practice.



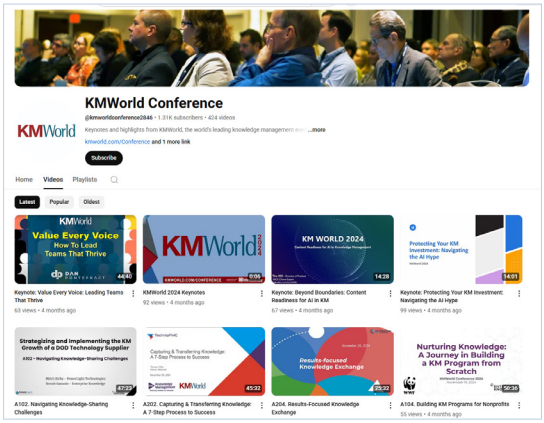
The types of articles published include:

- Evidence summaries that are typically based on recently published systematic reviews or notable individual research papers. Systematic reviews produce a more reliable knowledge base through accumulating findings from a range of studies.
- Feature articles and series that synthesize a range of research in regard to a topical KM issue.
- Article serials that present large research reports and dissertations in more readily digestible parts over a period of time.
- News items that announce events, book releases and reviews, or other significant developments in KM.

Site: SIRCL - Stan Garfield's KM Site sites.google.com/site/stangarfield

I have maintained this site since 2006. It includes all of my writing, speaking, interviews, and presentations. I also maintain lists of all of the resources featured in this chapter.

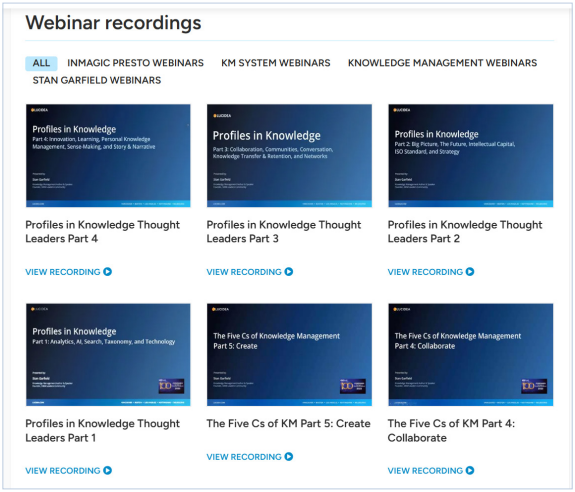
Videos: KMWorld youtube.com/@kmworldconference2846/videos



Video recordings of keynotes and highlights from KMWorld Conferences from 2015 to the present. I am featured in five of them:

- 2021 C104. Tomorrow's KM Leaders: Education for KMers!
- 2021 W15. Communities Of Practice for Knowledge Sharing & Innovation
- 2017 Keynote: KM Buy-In: Proven Practices
- 2015 Tutorial: 16 KM Myths Debunked
- 2015 Is KM dead?

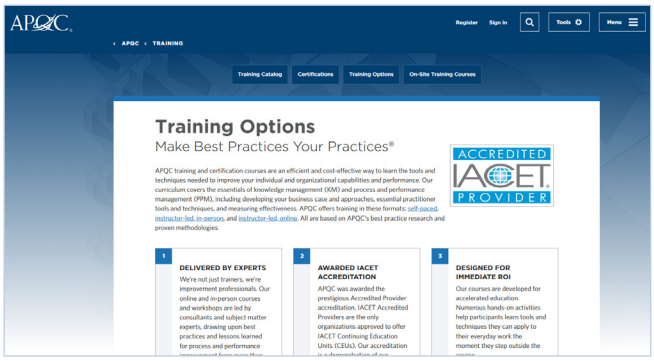
Webinars: Lucidea lucidea.com/presto/resources/#webinars



I have worked with Lucidea since 2016 – writing, presenting, and appearing at conferences. I have delivered 40 webinars for Lucidea, all of which are available as recordings at this site.

Lucidea's products help clients redefine how knowledge is shared. Lucidea provides applications and business process expertise that empower information intensive organizations to easily collect, organize, and leverage important knowledge assets. Lucidea's 6 Principles guide the development of products that improve organization, accessibility, ease of use, and delivery of information to the people who need this knowledge most – employees, customers, visitors, and researchers. Everything Lucidea offers clients embodies one or more of the following: access; discovery; independence; integration; security, or partnership.

Training: APQC apqc.org/what-we-do/training-options



I have worked with APQC since 2000 and have presented at conferences and in webinars multiple times. I have taken and delivered training for APQC.

APQC training and certification courses are an efficient and cost-effective way to learn the tools and techniques needed to improve your individual and organizational capabilities and performance. Our curriculum covers the essentials of knowledge management (KM) and process and performance management (PPM), including developing your business case and approaches, essential practitioner tools and techniques, and measuring effectiveness. APQC offers training in these formats: self-paced, instructor-led, in-person, and instructor-led, online. All are based on APQC's best practice research and proven methodologies.

Consultant: Dan Ranta danieleranta@gmail.com

I have known Dan since 2012 and have great respect for his knowledge, experience, and expertise. I interviewed him for my book *Proven Practices for Promoting a Knowledge Management Program*.

Dan Ranta has more than 30 years of experience in KM strategy, collaboration, content management, portal design, social networking and measuring business results. He has worked as a KM Leader for large, global companies and as a consulting practice leader in KM. His experiences across industries in understanding corporate challenges and cultures and accelerating the movement from strategy to action are well known and often written about in the KM space. He is currently a KM advisor and consultant.

At the 2023 Midwest KM Symposium, Dan made the following key points:

1. KM is fundamental to going digital.
2. Leadership + Behavior = Purposeful Collaboration.

3. Tacit knowledge is always more important than Explicit knowledge.
4. World class communities with governance are central to designing and implementing KM in the workplace.
5. Governance of context defines how to balance the formal (e.g., Adaptable Communities, Agile Interactions, Collaboration, Innovation) and informal (e.g., Frameworks. Roles, Methodologies. Processes) types of knowledge.
6. Sharing tacit knowledge helps employees handle situations that do not fit cleanly into established processes and structures.
7. Text analysis of CoP discussions helps define a taxonomy of capabilities and competencies.
8. Users can suggest new topics for the taxonomy.
9. Social Network Analysis reveals knowledge brokers already doing the work so they can become CoP leaders on a local level.

Thought Leader: Larry Prusak lucidea.com/blog/km-leader-larry-prusak/

The late Larry Prusak had one of the great minds in the field, providing useful insights based on his extensive reading, keen observations, and deep thinking. I was proud to call him my friend, and I miss him very much.

Here are ten quotes from Larry:

1. Knowledge flows along existing pathways in organizations. If we want to understand how to improve the flow of knowledge, we need to understand those pathways.
2. If you have one dollar to invest in knowledge management, put one cent into information management and 99 cents into human interaction.
3. Knowledge is in groups – not individuals.
4. Knowledge is what a knower knows. Taken literally, the need for a knower raises profound questions as to whether and how knowledge can exist outside the heads of individuals. Although knowledge can be represented in and often embedded in organizational processes, routines and networks, and sometimes in document repositories, it cannot truly originate outside the heads of individuals. Nor is it ever complete outside of an individual.
5. Those companies that don't adapt to understanding knowledge as a force of production more important than land labor and capital, will slowly die, and will never know what killed them.
6. The modern organization evolved in the 19th century to deal with land, labor and capital, not with knowledge, which was assumed to reside only in the heads of the owners and managers. This led us to the modern organization built on command-and-control mechanisms, run as hierarchical bureaucracies. This won't do when knowledge is the major source of value, as it is for most large organizations today.
7. One of the great conundrums in KM is compliance: how do you get people to do this? The smarter firms realize that it is situational. People aren't lazy or stupid or don't care; you should look at the way people work; if they don't use a system, then why not? It's almost always an issue of bounded rationality; we don't have the energy, money, time or space to do it.
8. Incentives work. Remember when asking people to share knowledge; we live in a bounded universe. You have limited energy, limited money and limited time. Why do X instead of Y without marginal utilization or incentives?
9. Everywhere I speak people conflate information and knowledge – and this situation is greatly abetted by IT vendors and consultants for obviously commercial reasons. I would estimate that tens of billions of dollars have been wasted by organizations trying to work with knowledge by buying IT tools. Since none of this is taught in business schools or perhaps ANY schools it isn't too surprising that most people can't define knowledge as distinct from information.
10. There's a struggle going on between those companies that have an overly technical focus on KM, and those that think it's all just talking and cultural issues. It's a real battle.

Chapter 2: Identify 3 Objectives

STEP 2: Identify the Top 3 Objectives for the program, focusing on meeting the biggest needs of the organization. List the challenges and opportunities your KM program will address. These objectives align business direction with program goals.

If you have decided (or been asked) to start a knowledge management initiative, the first thing to do is to determine what results you would like to achieve. Is there a challenge you would like to address or an improvement you hope to make? If not, ask people in your organization what is currently causing them the most pain in doing their jobs. Look for opportunities to help alleviate these pain points through sharing, innovation, reuse, collaboration, or learning.

If you can't find any challenges to address or improvements to make, and no one is experiencing any knowledge-related pain, then don't start a KM program. You will be trying to push a solution in search of a problem, and there will be no reason for anyone to adopt it.

At the other extreme, if you find lots of challenges and opportunities, you will need to narrow down the list. Pick three challenges or opportunities for which KM will likely provide the greatest benefit to the organization. These Top 3 Objectives represent the starting point for your program and the core of your communications. Use them to choose, start, review, adjust, and stop individual projects to ensure that they help achieve the desired benefits.

All organizations can benefit from their people sharing, innovating, reusing, collaborating, and learning. Based on an organization's mission and objectives, specific goals for a knowledge management program should be defined. Start with your senior executive's top priorities, define what you think needs to happen, and solicit the ideas of the people who are doing the work. The intersection of these three viewpoints should yield objectives that align the hopes of senior leadership, KM program leadership, and KM users.

Getting user input

In order to determine what needs to address, it is important to get user input. Conduct surveys to identify current challenges and needs, identify opportunities, and request suggestions.

Use an Opportunities Survey to identify current challenges and needs, and request suggestions for addressing them. Use this survey to determine business needs that knowledge management can support. Finding out what your users are struggling with, what they would like to see provided, and what they think should be done will help ensure that the Top 3 Objectives are based on real needs.

This survey can be used to help define the Top 3 Objectives for a knowledge management program. It should be conducted once before beginning any new KM initiative.

Opportunities Survey

1. Check all of the following challenges you are currently experiencing:
   1. It's difficult for my team to make decisions, and when we make them, they are bad.
   2. It's hard to find relevant information and resources at the time of need.
   3. We have to start from scratch each time we start a new project, and my team keeps reinventing the wheel.
   4. We repeat the same mistakes over and over.
   5. It's difficult to find out if anyone else has solved a similar problem before or already done similar work.
   6. Information is poorly communicated to me, and I am unaware of what has been done, what is happening, and where the organization is heading.
   7. I can't find standard processes, procedures, methods, tools, templates, techniques, and examples.
   8. I can't get experts to help me, because they are scarce, in great demand, and unavailable when needed.
   9. We are unable to respond to customers who ask for proof that we know how to help them and that we have done similar work before.
   10. It takes too long to invent, design, manufacture, sell, and deliver products and services to our customers.

2. List any other challenges you regularly experience with sharing, innovating, reusing, collaborating, learning, and searching for knowledge.

3. From the challenges you checked and the ones you listed, please rank the three most important in decreasing order of importance:
   1. <fill in the most important challenge>
   2. <fill in the second most important challenge>
   3. <fill in the third most important challenge>

4. What examples can you provide where sharing, innovating, reusing, collaborating, learning, and searching for knowledge are working well today?

5. What examples can you provide where sharing, innovating, reusing, collaborating, learning, and searching for knowledge worked well in the past?

6. What examples can you provide where sharing, innovating, reusing, collaborating, learning, and searching for knowledge worked well in the past or are working well today in other organizations?

7. What suggestions do you have for dealing with any of the challenges you identified?

8. What other needs do you have for sharing, innovating, reusing, collaborating, learning, and searching for knowledge?

9. What suggestions do you have for meeting the needs you identified?

10. Describe how knowledge management should work ideally.

Challenges

After you conduct an Opportunities Survey, compile and review the results. Here some examples of challenges you may find.

1. **Bad decisions:** Poor decisions are made, it takes too long to make decisions, or it is impossible to make decisions. The impact is lost business, missed opportunities, and reduced profits.
2. **Poor search capability:** It's hard to find relevant information and resources when needed. As a result, people waste time searching, and can't take advantage of information that exists but can't be located.
3. **Reinventing the wheel:** Employees have to start from scratch each time they start a new project. This leads to wasted effort, increased costs, delays, and suboptimal results.
4. **Repetitive mistakes:** The same mistakes are repeated over and over. This causes cost overruns, losses, and unhappy customers.
5. **Don't know what we know:** It's difficult to find out if anyone in the organization knows something, has done something, or has solved a similar problem before. Any potential advantages from reusing previous experience are squandered.
6. **Ignorance:** Information is communicated slowly, to a limited subset of the organization, or not at all. The result is that people are unaware of what has been done before, what is happening elsewhere, and where the organization is heading. This is not good for morale, customer satisfaction, and business results.
7. **Inadequate standards:** There is a shortage of standard processes, procedures, methods, tools, templates, techniques, and examples. This results in inconsistency, sloppy work, and poor quality products and services.
8. **Expertise shortages:** Experts are hard to find, in great demand, and unavailable when needed. The effect is that scarce expertise is missed rather than leveraged, and knowledge that could have been applied to solve a problem or exploit an opportunity is not.
9. **Poor reference capability:** Your organization is unable to respond to customers who ask for proof that you know how to help them and that you have done similar work before. This causes bids to be lost that could have been won.
10. **Long cycle times:** It takes too long to invent, design, manufacture, sell, and deliver products and services to your customers. The impact is missed markets, delayed revenues, and customers lost to competitors.

Opportunities

Use the results of the Opportunities Survey, the goals of your organization, and your knowledge of what other firms are doing to help compile a list of opportunities. Here are some you may identify.

1. **Speed and agility**: Enable rapid decision making. This optimizes the use of resources, increases the win rate, and positively affects the state of the business.
2. **Findability**: Make it easy to find relevant information and resources. This takes advantage of available intelligence at the time of need.
3. **Effectiveness**: Take advantage of existing expertise and experience. If you know what you know, you can apply it appropriately.
4. **Learning**: Communicate important information widely and quickly. An informed work force can act in accordance with company strategy and direction.
5. **Repeatability**: Provide standard processes, procedures, methods, tools, templates, techniques, and examples. The result is consistent products and services of high quality.
6. **Opportunism**: Make scarce expertise widely available. Applying key knowledge from one part of the organization when it is needed by another can make the difference in winning a deal, satisfying a customer, or resolving a crisis.
7. **Efficiency**: Accelerate delivery to customers. The sooner the customer gets what they ordered, the sooner you will get the revenue. And the more likely they are to order again.
8. **Leverage**: Enable the organization to take advantage its size. Being larger than your competition is not an advantage unless you take steps to exploit this fact. And it can be a disadvantage if it results in delays, suboptimal resource assignments, or inconsistent treatment. The benefits of large size include increased responsiveness, greater range of expertise, and better backup capabilities.
9. **Reliability**: Make the organization's best problem-solving experiences reusable. The fact that someone has already solved a problem allows the same approach to be used the next time it arises. This speeds up resolution, reduces negative impacts, and keeps customers satisfied.
10. **Innovation**: Stimulate growth through curiosity, invention, process improvement, cycle time reduction, and creative new ways of doing things. Benefits include market leadership, revenue growth, and improved brand equity.

Benefits of Knowledge Management

You can select from the following list of 15 benefits to help define the Top 3 Objectives.

1. Enabling better and faster decision making

By delivering relevant information at the time of need through structure, search, subscription, syndication, and support, a knowledge management environment can provide the basis for making good decisions. Collaboration brings the power of large numbers, diverse opinions, and varied experience to bear when decisions need to be made. The reuse of knowledge in repositories allows decisions to be based on actual experience, large sample sizes, and practical lessons learned.

2. Making it easy to find relevant information and resources

When faced with a need to respond to a customer, solve a problem, analyze trends, assess markets, benchmark against peers, understand competition, create new offerings, plan strategy, and to think critically, you typically look for information and resources to support these activities. If it is easy and fast to find what you need when you need it, you can perform all of these tasks efficiently.

3. Reusing ideas, documents, and expertise

Once you have developed an effective process, you want to ensure that others use the process each time a similar requirement arises. If someone has written a document or created a presentation that addresses a recurring need, it should be used in all future similar situations. When members of your organization have figured out how to solve a common problem, know how to deliver a recurring service, or have invented a new product, you want that same solution, service, and product to be replicated as much as possible. Just as the recycling of materials is good for the environment, reuse is good for organizations because it minimizes rework, prevents problems, saves time, and accelerates progress.

4. Avoiding redundant effort

No one likes to spend time doing something over again. But they do so all the time for a variety of reasons. Avoiding duplication of effort saves time and money, keeps employee morale up, and streamlines work. By not spending time reinventing the wheel, you can have more time to invent something new.

5. Avoiding making the same mistakes twice

George Santayana said, “Those who ignore history are doomed to repeat it.” If we don’t learn from our mistakes, we will experience them over and over again. Knowledge management allows us to share lessons learned, not only about successes, but also about failures. In order to do so, we must have a culture of trust, openness, and reward for willingness to talk about what we have done wrong. The potential benefits are enormous. If NASA learns why a space shuttle exploded, it can prevent recurrences and save lives. If FEMA learns what went wrong in responding to a natural disaster, it can reduce the losses caused by future disasters. If engineers learn why highways and buildings collapsed during a previous earthquake, they can design new ones to better withstand future earthquakes. If you learn that your last bid or estimate was underestimated by 50%, you can make the next one more accurate and thus earn a healthy profit instead of incurring a large loss.

6. Taking advantage of existing expertise and experience

Teams benefit from the individual skills and knowledge of each member. The more complementary the expertise of the team members, the greater the power of the team. In large organizations, there are people with widely varying capabilities and backgrounds, and there should be a benefit from this. But as the number of people increases, it becomes more difficult for each individual to know about everyone else. So even though there are people with knowledge who could help other people, they don’t know about each other. The late Lew Platt, former CEO of HP, is widely quoted as saying “If only HP knew what HP knows, we would be three times more productive.” Knowing what others know can be very helpful at a time of need, since you learn from their experience and apply it to your current requirements.

7. Communicating important information widely and quickly

Almost everyone today is an information worker, either completely or partially. We all need information to do our jobs effectively, but we also suffer from information overload from an increasing variety of sources. How can we get information that is targeted, useful, and timely without drowning in a sea of email, having to visit hundreds of websites, or reading through tons of printed material? Knowledge management helps address this problem through personalized portals, targeted subscriptions, alerts and notifications, RSS feeds, tagging, and enterprise search engines.

8. Promoting standard, repeatable processes and procedures

If standard processes and procedures have been defined, they should always be followed. This allows employees to learn how things are done, leads to predictable and high-quality results, and enables large organizations to be consistent in how work is performed. By providing a process for creating, storing, communicating, and using standard processes and procedures, employees will be able to use them routinely.

9. Providing methods, tools, templates, techniques, and examples

Methods, tools, templates, techniques, and examples are the building blocks supporting repeatable processes and procedures. Using these consistently streamlines work, improves quality, and ensures compatibility across the organization.

10. Making scarce expertise widely available

If there is a resource who is in great demand due to having a skill that is in short supply, knowledge management can help make that resource available to the entire organization. Ways of doing so include community threaded discussions, training events, ask the expert systems, recorded presentations, white papers, blogs, podcasts, and videos.

11. Showing customers how knowledge is used for their benefit

In competitive situations, it is important to be able to differentiate yourself from other firms. Demonstrating to potential and current customers that you have widespread expertise and have ways of bringing it to bear for their benefit can help convince them to start or continue doing business with you. Conversely, failure to do so could leave you vulnerable to competitors who can demonstrate their knowledge management capabilities and benefits.

12. Accelerating delivery to customers

Speed of execution is another important differentiator among competitors. All other things being equal, the company that can deliver sooner will win. Knowledge sharing, reuse and innovation can significantly reduce time to deliver a proposal, product, or service to a customer. And that translates into increased win rates, add-on business, and new customers.

13. Enabling the organization to leverage its size

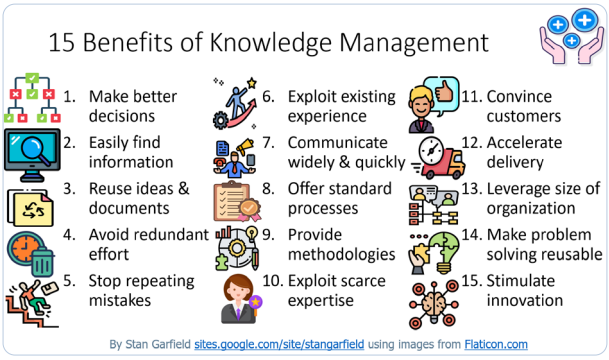
As an organization grows, the increasing size is only a benefit if it can use the knowledge of all of its employees. Through the use of tools such as communities, expertise locators, and repositories, the full power of a large enterprise can be exploited.

14. Making the organization's best problem-solving experiences reusable

Consistently applying proven practices, also known as best practices or good practices, can significantly improve the results of any firm. For example, if a manufacturing plant in one part of the world has figured out how to prevent the need for product rework, and all other plants around the world adopt this practice, savings will flow directly to the bottom line. By establishing a process for defining, communicating, and replicating proven practices, an enterprise takes advantage of what it learns about solving problems.

15. Stimulating innovation and growth

Most businesses want to increase their revenues, but it becomes increasingly difficult as industries mature and competition increases. Creating new knowledge through effective knowledge sharing, collaboration, and information delivery can stimulate innovation. If you achieve this and many of the other 14 benefits enabled by knowledge management, you should be able to achieve growth.



Examples

From challenges and opportunities such as these, choose the ones that are most compelling to your organization and relate them to desired business results. Here are three sets of examples.

1. Non-Profit Organization
   1. Lower costs by preventing people from reinventing the wheel.
   2. Eliminate deficits caused by repeating the same mistakes.
   3. Increase contributions by innovating and creating new capabilities.

2. Manufacturing Company
   1. Increase orders by better collaboration between sales, services, and back-office functions.
   2. Increase revenue by stimulating a flow of ideas for new products and services.
   3. Increase profits by sharing and reusing lessons learned.

3. Consulting Firm
   1. Increase win rate by improving the proposal development process.
   2. Lower sales and delivery costs by reusing proven practices.
   3. Increase engagement quality by collaborating with customers and partners.

A KM program must respond to the fundamental needs of an organization. If it helps address these challenges and opportunities, it will succeed. If it is not tightly coupled to core business objectives, it will fail.

Chapter 3: Get Leadership Commitment and Assess Culture

STEP 3: Gain the sponsorship, commitment, and active support of senior leadership. There are ten commitments from the leader of your organization that will enable your KM program to be implemented successfully if the culture is conducive to knowledge sharing.

After identifying the Top 3 Objectives, the next step is to obtain the 10 Commitments from the senior executive. This will ensure that your organization thoroughly supports the KM program to be implemented.

You need to get the top leader of your organization to sponsor the program you intend to launch. The best way to do this is to create a springboard story to motivate the leadership team, using narrative to ignite action and implement your new ideas.

Look for a successful case of sharing, innovating, reusing, collaborating, or learning that can serve as a good example of what should become institutionalized. Start by looking within your organization, then to other organizations within your enterprise, and finally to other enterprises. What you need is a simple example of how a KM approach was applied to one of the challenges or opportunities in your Top 3 Objectives List with the desired results.

Tell this springboard story to the senior executive and the leadership team. If you get a positive response, then present the Top 3 Objectives and how you identified them to prove that you have done your homework and are prepared to proceed upon approval.

Ask the senior executive to agree to the following 10 Commitments.

1. Approve a reasonable budget for people and other KM expenses. You will need money and staff to launch and run the program.
2. Ensure that all KM leaders have the time to do a good job in the role and are allowed to meet in person once a year. The KM team will need assurances that they will be allowed the time they need and the ability to get together to build trust.
3. Learn how to give a KM program overview presentation. If the senior executive is familiar with the details of the program, this will reinforce its importance.
4. Learn how to use KM tools and use them to lead by example. To offer more than lip service in support of the program, show everyone how easy it is to actually use the processes and technology.
5. Communicate regularly about how the organization is doing in KM. It should be on the agenda for all meetings, calls, and webcasts.
6. Provide time during leadership team meetings and employee communication events for KM messages. The other leaders need to be reminded regularly of the importance of KM in achieving the organization's goals.
7. Ensure that KM goals are really set for all employees and are enforced. It's not sufficient to communicate goals in a high-level message. They need to actually be assigned, monitored, and achieved.
8. Inspect compliance to KM goals with the same fervor as for other key performance indicators. If KM indicators are reviewed along with the usual business metrics, it will be clear that they are just as important.
9. Reward employees who share, innovate, reuse, collaborate, and learn. Rewarding desired behaviors provides positive reinforcement, offers motivation, and communicates to everyone how such behaviors are valued.
10. Ensure that time is allowed for sharing, innovating, reusing, collaborating, and learning. Part of establishing a knowledge sharing culture is allowing time for the necessary activities.

If you don't get approval of The 10 Commitments, you will need to revisit the Top 3 Objectives and your springboard story. Return with a more relevant set of objectives and a more compelling story.

If you do gain the approval of the senior executive, you need to ensure that the commitments are kept. To do so, take the following actions:

1. Submit a reasonable budget for people and other KM expenses.
2. Submit a proposal for the first annual meeting.
3. Schedule an event at which the senior executive will give the KM program overview presentation.
4. Subscribe the senior executive to an appropriate threaded discussion and ask them to post or reply to a question.
5. Prepare a communication to be distributed to all members of the organization.

6. Request time during a leadership team meeting and the next employee communication event for a KM message to be presented.
7. Prepare a communication setting KM goals for all employees.
8. Request that the organization's balanced scorecard or equivalent performance indicator reporting be updated to include compliance to KM goals.
9. Submit a proposal for a recognition program to reward employees who share, innovate, reuse, collaborate, and learn.
10. Prepare a document defining how time is allowed and can be reported for sharing, innovating, reusing, collaborating, and learning.

Then follow up periodically to update these actions as required.

Culture and Values

The 10 Commitments require that your organization embodies a culture with core values conducive to knowledge sharing. Identifying the current culture and values of your organization will help you take advantage of those elements conducive to knowledge sharing and address those that are not, with the help of the senior executive's commitments.

Understanding how people interact with each other in your organization, typical styles of behavior, fundamental operating principles, and the code of conduct is a necessary prelude to introducing a knowledge management initiative. If the culture of the organization does not include sharing and collaboration, a significant change management initiative will be needed to start changing the culture. If it does, the KM program will be adopted more readily.

Most organizations have codes of conduct, core values, and ethical standards that are widely communicated. There is considerable pressure to train all employees on expectations for behavior, and to repeat this training every year. Start by reviewing the published values, and then compare these to the observed culture. If they are not consistent, your change management initiative will need to address aligning corporate culture to the stated core values.

Core values typically include some of the following: delight customers, respect others, achieve exceptional results, work collaboratively, move quickly, be creative, act with integrity, embrace diversity, deliver with high quality, and be decisive. Codes of conduct will usually address how to conduct business, treat customers, work with partners, deal with competitors, avoid conflicts of interest, handle confidential information and intellectual property, care for assets, interact with local communities, and treat the environment.

Actual culture will encompass both positive and negative elements. Positive attributes include caring, collaborative, cooperative, networked, decisive, egalitarian, supportive, open, sharing, trusting, transparent, fair, inclusive, willing to try new ways, giving credit, adopting good ideas, volunteering, communicative, bold, respectful, honest, responsive, thorough, nurturing, generous, helpful, altruistic, appreciative, pleasant, accepting responsibility, and optimistic.

Negative attributes include insensitive, selfish, undermining, not invented here syndrome, cover your rear, old-boy network, reticent, secretive, closed, dictatorial, waffling, uncooperative, isolated, manipulative, exclusive, blaming, ridiculing, usurping credit, hierarchical, controlling, resistant to change, hoarding, siloed, passive aggressive, critical, making excuses, backstabbing, complaining, and pessimistic.

If the culture of your organization includes primarily positive elements, a KM initiative will fit in well with the prevailing behavior modes. If it includes mostly negative attributes, you have your work cut out for you. Culture change will be a critical success factor to embracing the new ways of behaving needed to support knowledge management. If the culture is a mixture of positive and negative elements, you will want to use the positive ones to support your efforts and use a change management process to address the negative ones.

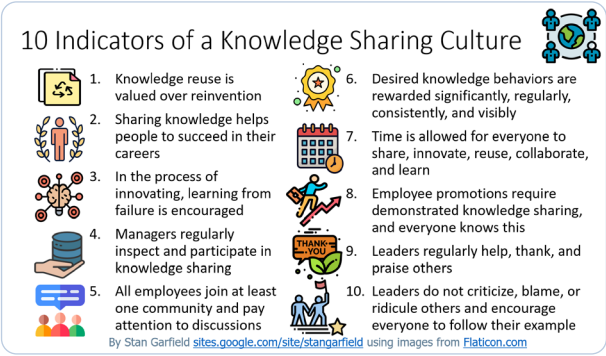
People in your organization will support, ignore, or undermine a new initiative. Your goal is to attract as many supporters as possible, while watching out for and neutralizing detractors.

Search for supporters who embrace knowledge management, including connectors – those with wide social circles who connect people to each other; mavens – knowledgeable experts who connect people through sharing knowledge; and salespeople – charismatic people with powerful negotiation skills who use knowledge to engage and persuade.

Be vigilant for those who will oppose, delay, or stall the KM program, including naysayers – those who are negative, contrary, and pessimistic; whiners – those who complain about anything and point out defects, flaws, and obstacles; and snipers – those who attack new ideas, are threatened by others, and who actively oppose change. When detractors are identified, try to engage them constructively. Actively listen to their complaints, directly address them, and try to convert them into supporters. If that does not work, contact their leaders to coach them to improve their behavior. If all else fails, be prepared with responses to the most typical objections, criticisms, and complaints.

To help create a culture dominated by positive elements, get your senior executive to endorse, communicate, and exemplify the following credo:

- I will practice and reward caring, sharing, and daring – caring for others, sharing what I know, and daring to try new ideas.
- I will insist on trust, truth, and transparency in all dealings – earning and respecting the trust of others, communicating truthfully and openly, and demonstrating and expecting accountability.
- I will look for opportunities to help, thank, and praise others.
- I will eliminate criticism, blame, and ridicule in all interactions with others.



Assessing Organizational Culture

If the culture of the organization includes primarily positive elements, it can be described as a favorable culture. If it includes mostly negative attributes, it can be described as a detrimental culture. If the culture is a mixture of positive and negative elements, it can be described as a neutral culture.

To see what kind of culture your organization has, go through the list below, putting check marks next to the attributes that prevail. Then add up the ones that fall under the favorable categories (those with the letter "F" after the number) and those the fall under the detrimental categories (those with the letter "D" after the number). If most of the attributes are favorable, that's a good sign. If most of the attributes are detrimental, that's a bad sign. If the mix is roughly even, you can either view this as the glass being half-full (optimistic) or half-empty (pessimistic).

What can you do about a detrimental culture? The senior executive will need to change some or all of the leaders under them, start communicating and demonstrating new ways of doing things, and continue communicating and leading by example until the rest of the organization follows suit.

Culture Categories and Attributes

- F = Favorable
- D = Detrimental

1F. Accountable
- Accept and take responsibility
- Admit mistakes
- Handle confidential information with discretion
- Protect intellectual property
- Care for assets
- Take ownership

1D. Unaccountable
- Pass the buck
- Blame someone else
- Cover your rear
- Make excuses
- Say "it's not my problem"

2F. Active
- Take action as needed, after careful consideration, and in a timely manner
- Volunteer
- Plan, but not forever
- Bias for action
- Responsive
- Persistent
- Persuasive
- Appropriately assertive
- Energetic

2D. Indolent
- Plan endlessly
- Lots of talk, but little or no action
- Collect metrics for the sake of metrics
- Obsess over numbers, but take no action based on them
- Ignore direct requests
- React only
- Obsess over preventing risk
- Avoid work
- Reluctant to act
- Lethargic
- Passive aggressive

3F. Aesthetic
- Beauty
- Harmony
- Good design
- Artistic
- Elegant

3D. Unaesthetic
- Bad design
- Unsightly
- Unappealing
- Dissonant

4F. Brave
- Take a chance
- Go for it
- Take risks
- Strong
- Bold
- Daring
- Courageous

4D. Fearful
- Play it safe
- Avoid risks
- Timid
- Afraid
- Pushover
- Spineless
- Weak

5F. Calm
- Remain calm even in stressful times
- Calm down others
- Patient
- Poised

5D. Agitated
- Stress out
- Blow up
- Anxious
- Easily excitable
- Angry

6F. Civically responsible
- Engage constructively with local communities
- Treat the environment well
- Act responsibly in local communities and the environment

6D. Civically neglectful
- Avoid interacting with local communities
- Treat the environment poorly
- Abdicate responsibility in local communities and the environment

7F. Collaborative
- Work well with others
- Routinely collaborate across organizational boundaries
- Actively participate in communities and networks
- Pursue strong, weak, and loose ties
- Well-connected
- Networked internally and externally
- Boundary-spanning
- Cooperative
- Appropriately competitive

7D. Isolated
- Individuals go it alone
- Operate mostly within silos
- Rely on an "old-boy network" - whom you know is important
- Private groups
- Cliques
- Stovepipes
- Internal only
- Uncooperative
- Aggressively competitive

8F. Communicative
- Use the right channel for each mode
- Use words and expressions that are widely understood
- Use good spelling and grammar
- Enlighten by communicating appropriately, thoroughly, and promptly
- Tell stories
- Speak spontaneously
- Use direct language
- Communicate openly
- Communicate frequently
- Use authentic voice
- Listen actively
- Converse effectively
- Present effectively
- Eloquent

8D. Inarticulate
- Use email for everything
- Use corporate speak, buzzwords, insider jargon, and corporate lingo
- Use poor spelling and grammar
- Recite dry facts
- Repeat the usual message
- Use clichés
- Spin
- Bloviate
- Pontificate
- Fail to listen
- Converse poorly
- Present poorly
- Withhold information
- Guarded
- Inauthentic
- Boring

9F. Decisive
- Willing to decide
- Before deciding, ask those who know the most
- Make timely decisions based on available information

9D. Indecisive
- Reluctant to decide
- Don't listen to those who know
- Waffle

10F. Diverse
- Embrace and celebrate differences
- Wide cognitive, demographic, and experiential variation
- Tolerant
- Inclusive

10D. Homogeneous
- Little or no cognitive, demographic, and experiential variation
- Intolerant
- Exclusive
- Uniform

11F. Empowered
- Flat organization
- Holacracy
- Autonomous
- Free to act
- Egalitarian

11D. Controlled
- Follow orders
- Command and control
- Formal structure
- Red tape
- Autocratic
- Hierarchical
- Bureaucratic
- Level-conscious
- Dictatorial

12F. Ethical
- Stand up for what is right
- Strive to uphold a core set of principles and values
- Do what is right – logically, financially, morally, ethically, and environmentally
- Act with integrity
- Avoid conflicts of interest
- Honest
- Truthful

12D. Unprincipled
- Bow to pressure
- Cover up
- Cheat
- Corrupt
- Unethical
- Immoral
- Dishonest
- Deceitful

13F. Excellent
- Deliver the maximum possible amount of high-quality work
- Do things the right way – honestly, accurately, correctly, and completely – with good effort, resulting in high quality
- Achieve expected and exceptional results
- Set and achieve high expectations
- Meet all commitments
- Delight customers
- Consistent
- Efficient
- Effective
- Productive
- Thorough

13D. Mediocre
- Just punch the clock
- Do the minimum
- Have no time for anything
- Do only what is requested
- Fail to achieve expected results
- Miss commitments
- Inconsistent
- Inefficient
- Ineffective
- Unproductive
- Careless

14F. Independent
- Think for yourself
- Think critically
- Skeptical about conventional wisdom

14D. Conformist
- Always go by the book
- Follow the crowd
- Blindly follow fads, trends, frameworks, models, benchmarking, certification, personality tests, etc.

15F. Innovative
- Embrace change
- Try new ways and things
- Fail fast
- Safe fail
- Creative
- Inspired

15D. Conventional
- Resist change
- Stick to the tried and true
- Wait and avoid
- Stagnate
- Uncreative
- Uninspired

16F. Leading
- People rise in the ranks based on merit: meritocracy
- Leaders demonstrate and require excellence
- Serve by supporting team members with whatever they need
- Know what's going on
- Practice Management By Walking Around
- Approachable, visible, and accessible
- Vision
- Long-term oriented
- Inspirational
- Leaders lead by example, practice what they preach, and model desired behaviors

16D. Supervisory
- Leaders with little (if any) talent and skill are dominant and highly influential: mediocracy
- Do as I say, not as I do
- Don't lead by example
- Avoid getting hands dirty
- Out of touch with what is going on
- Protected and isolated
- Myopic
- Short-term oriented

17F. Learning
- Want to learn
- Make time to read regularly
- Take time to reflect
- Coach and mentor
- Intellectually curious
- 17D. Ignorant
- Don't spend time learning
- No time to reflect
- Rely on others to know things
- Act like a know-it-all

18F. Loving
- Caring
- Compassionate
- Appreciative
- Nurturing
- Empathetic

- Sensitive
- Pleasant

18D. Mean
- Uncaring
- Callous
- Demeaning
- Unsympathetic
- Insensitive
- Unpleasant

19F. Mensch-centric
- Trust people and colleagues, unless they give reasons not to
- Always have colleagues' backs
- Regularly thank, praise, recognize, and reward colleagues
- Don't care who gets the credit
- Respect others
- Encourage others
- Treat others fairly
- Decent
- Supportive
- Humble
- Loyal

19D. Jerk-centric
- Seek scapegoats
- Exploit others
- Show favoritism
- Blame
- Ridicule
- Criticize
- Embarrass
- Undermine
- Intimidate
- Threaten
- Abuse power
- Bully
- Badmouth
- Belittle
- Backstab
- Biased
- Manipulative
- Overly aggressive
- Suspicious
- Unfair

20F. Optimistic
- Look for the good in everything
- Believe in team goals
- Have faith in others
- Positive
- Upbeat
- 20D. Pessimistic
- Complain
- Whine
- Point out what's wrong or why ideas won't work
- Negative
- Cynical

- 21F. Passionate
- Enthusiastic
- Zealous
- Ardent

21D. Apathetic
- Dispassionate
- Unenthusiastic
- Dull

22F. Reuse-oriented
- Search for what can be reused
- Adopt good ideas
- Replicate proven practices
- Apply lessons learned
- Credit others

22D. Reinventing or plagiarizing
- Reinvent the wheel
- Start from scratch
- Suffer from not-invented-here syndrome
- Usurp credit
- Fail to credit others

23F. Sharing
- Willing to ask for help in public
- Unafraid to expose ignorance
- Practice open book management
- Seek out the ideas of others
- Open
- Transparent
- Generous
- Helpful
- Altruistic
- Selfless

23D. Secretive
- Operate in a closed manner
- Communicate privately, excluding others unnecessarily
- Won't ask or share openly
- Afraid to expose ignorance
- Hide behind closed doors
- Hoard knowledge
- Obscure
- Obstruct
- Obfuscate
- Selfish
- Reticent
- Sheltered

24F. Timely
- Do things right away
- Meet all deadlines
- Show up on time
- Make no excuses
- Move as quickly as is prudent
- Face up to reality
- Spend time wisely
- Prompt

24D. Procrastinating

- Slow to decide and act
- Stall
- Delay
- Miss deadlines
- Make excuses
- Avoid what is unpleasant
- Waste time
- Late

25F. Wise

- Demonstrate good judgment
- Use common sense
- Apply intellectual rigor
- Possess needed skills
- Logical
- Rational
- Pragmatic
- Competent
- Expert
- Intelligent

25D. Obtuse

- Demonstrate poor judgment
- Operate by the seat of the pants
- Lack needed skills
- Illogical
- Irrational
- Impractical
- Incompetent
- Inept
- Dense

Chapter 4: Answer 9 Questions on People/Process/Technology

STEP 4: Answer nine questions about people, process, and technology. Determine who will participate in the program, which basic processes will be required, and how tools will support the people and processes.

The program may apply to everyone, or to a subset of the population. There will be different roles for different job types. And leaders need to be aligned to the program direction.

Existing processes and policies will have to be modified, and new ones created. And tools will need to be used, created, obtained, and integrated.

To identify these details, answer the following nine questions about people, process, and technology.

People Questions

1. Which people in your organization need to participate in the KM program? In some programs, everyone will participate in some way. In others, you may target a specific type of participant. The Top 3 Objectives you defined will help answer this question. The following dimensions should be considered.

Is the program targeted for specific departments, groups, business units, or functions? Examples include Human Resources, Finance, Legal, Research & Development, Information Technology, Operations, Marketing, Sales, and individual product or service lines of business. A program may be initially designed to support only the needs of the Legal department. If it goes well, then additional departments may be added.

Which job roles will participate? Examples include salespeople, programmers, product designers, help desk specialists, shop floor technicians, contract administrators, purchasing agents, loan officers, nurses, engineers, customer service representatives, administrative assistants, and technical specialists. A knowledge base to support help desk specialists is a typical application.

Will the experience or rank of employees matter? Does the program apply only to entry-level, junior, intermediate, advanced, or senior people? A knowledge sharing program for new hires to help acclimate them to the organization may not apply to those who have been there for a long time.

Is the program for certain supervisory roles or levels only? Examples include individual contributors, team leaders, project managers, first-level managers, middle managers, and senior managers. A knowledge capture and reuse process for project managers may be designed for their specific requirements.

Does expertise level count? Should only novices, veterans, experts, masters, or gurus participate? A community of practice may be created that is limited to experts, masters, and gurus to ensure that their scarce time is conserved.

Will the program address specific areas of responsibility? Examples include customer-facing, back-office, and fiduciary responsibilities. An initiative can be focused on linking customer-facing and back-office personnel to improve communication and collaboration.

Is the initiative for a certain type of team location? Teams may be located at a single site, in one city, in one country, in a single region, or worldwide. A KM program for a team located in a single site might involve regular gatherings to share knowledge, while a global team might emphasize threaded discussions.

2. What are the different roles that participants will need to play? For each type of participant in the KM program, define what they are expected to do. Some will be providers and some will be consumers of knowledge. Most people will be expected to perform multiple roles. Specify the most important tasks for each type of participant that support the Top 3 Objectives.

Following is a list of roles from which to choose.

1. leader: defines and communicates the core values of the organization, sets and communicates direction and goals, and inspects and ensures performance
2. knowledge manager or assistant: leads and supports the KM program as full-time or part-time jobs
3. survey taker, administrator, or creator: provides user input by participating in taking and administering surveys
4. networker or collaborator: connects with other people as part of a social network or community and helps them out as needed
5. community member or leader: participates in or leads communities of practice
6. student, teacher, or training developer: takes, teaches, or develops training courses
7. reader or author: reads or writes user documentation
8. methodology user or developer: uses or designs standard methodologies
9. inventor or innovator: creates new knowledge
10. reuser, contributor, or content owner: reuses, shares, or provides knowledge
11. reporting consumer or provider: uses or creates metrics reports
12. change agent: enables process or culture change to occur
13. process user or provider: uses or creates work processes
14. inquirer or searcher: asks questions or searches for content

15. storyteller: uses narrative to motivate others to take action, build trust, transmit values, get others working together, share knowledge, tame the grapevine, and create and share a vision of the future.
16. tool user or provider: uses or creates tools and systems
17. threaded discussion participant or moderator: participates in or leads threaded discussions
18. expertise locator or provider: locates expertise or serves as an expert for others
19. taxonomy governor: defines and maintains a standard classification system used for metadata, navigation, and searching
20. tagger: applies metadata tags to content so that searches and aggregators will find it
21. archiver: archives content so that it is preserved
22. blogger: publishes blog entries, links to other blogs, and responds to comments
23. wiki author: edits wiki entries or creates wikis to allow cooperative editing
24. podcaster or vlogger: records and distributes audio or video broadcasts
25. subscriber, syndicator, or publisher: subscribes to news, blogs, wikis, podcasts, vidoes; syndicates or aggregates any of these; or publishes any of these

3. Who are the key stakeholders and leaders to line up in support of the new initiatives? The success of the program will depend on having leaders and respected individuals playing active roles in communicating, inspecting, and reinforcing its goals.

Identify both specific leaders, e.g., the senior executive, the chief technical officer, or the human resources leader, and leadership categories, e.g., all managers, all senior technical fellows, or all program managers. Then define what each of these leaders will be asked to do.

For example, what do you want the senior executive to do? To participate in a kickoff webcast? Send out a message to all employees? Include KM in the balanced scorecard?

What do you need all managers to do? Include KM goals in all performance plans? Inspect compliance to those goals? Enforce them during performance reviews?

What should respected experts be asked to do? Lead communities? Respond to questions? Publish white papers?

Answer these questions, and then contact the key stakeholders and leaders to enlist their participation, support, and leadership.

Process Questions

4. What existing processes need to be modified to incorporate KM activities? From the following list, identify all processes that already exist and need to be part of the KM program.

Here is a list of processes:

1. methodologies
2. creation
3. capture
4. reuse
5. lessons learned
6. proven practices
7. collaboration
8. content management
9. classification
10. metrics and reporting
11. change management
12. workflow
13. valuation
14. Social Network Analysis
15. Appreciative Inquiry and Positive Deviance
16. storytelling

There may be existing methodologies. Some collaboration methods may already be in use. Workflow may be performed using some technology. Compile a list of all processes currently in use that you can include in the KM initiative, either as is or by adapting them.

5. What new processes need to be created? In answering the previous question, which processes don't currently exist, but are needed? From the above list, identify all additional processes that are needed but are not currently available.

For example, there may not be any process for capturing and reusing knowledge. Lessons learned and proven practices may not be collected currently. The organization may not be aware of Appreciative Inquiry as a technique.

Choose the most critical missing processes for inclusion in the program. Consider the potential difficulty in implementation and the anticipated benefits of each in making your selections.

6. What policies will need to be changed or created to ensure desired behaviors? Adopting, enhancing, and creating processes will be of limited value unless there are associated policies that require their use. For the most important processes, plan to create policies to enforce adoption.

For example, a content management policy may be required to specify how content is created, stored, and reused. A classification standard which defines the organization's taxonomy and how it is to be deployed may be needed. A standard procedure for how intellectual property is to be valued may need to be enforced.

Technology Questions

7. What existing tools can be used in support of the new initiatives? From the following list, identify all tools that already exist and need to be part of the KM program.

Here is a list of tools:

1. user interface
2. intranet
3. team spaces
4. virtual meeting rooms, web/video/audio conferencing, and

telepresence
5. portals
6. repositories
7. threaded discussions and Enterprise Social Networks
8. expertise locators and ask the expert
9. metadata and tags
10. search engines
11. archiving
12. blogs
13. wikis
14. podcasts and videos
15. syndication, aggregation, and subscription management systems
16. social software and social media
17. external access
18. workflow applications
19. process automation
20. gamification applications
21. e-learning
22. analytics and business intelligence
23. artificial intelligence

For example, your organization already has an intranet. You are already using a tool for virtual meetings. An e-learning system already exists. There may be a tool for subscription management. Using all such existing tools as part of the KM program will save money, accelerate implementation, and demonstrate the important concept of reuse.

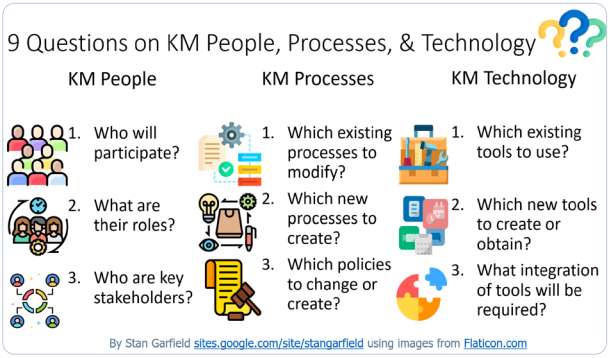
8. What new tools will need to be created or obtained? In answering the previous question, which tools don't currently exist, but are needed? From the above list, identify all additional tools that are needed but are not currently available.

For example, there may be no suitable technology for team spaces. Discussions may currently be taking place using standard email, and thus not archived for future searches. Tools such as blogs, wikis, and podcasts may not be available. AI tools may be under development or evaluation.

Select the most important missing technologies for inclusion in the program. Analyze the likely costs and benefits of each in making your choices.

9. What integration of tools and systems will be required? Purchasing or developing a series of standalone, disconnected tools will pose problems for a KM program. Users will complain about too many websites to visit, redundant data entry required, and overlapping and confusing technology.

To avoid these problems, plan to integrate as many tools and systems as possible. Automate data flows to avoid the need for redundant entry. And purchase or develop suites of products that work well together. For example, add a data feed from a business system to a knowledge repository. Design a website that pulls information from multiple sources to provide a unified view. Ensure that the incentive points tracking system automatically detects all desired actions and doesn't require manual entry. Feed important data into a GenAI tool.



Getting user input

To help answer these questions, it is important to get user input. Conduct surveys to identify participants; request process and technology suggestions; and scan the current landscape. The results of the Opportunities Survey conducted for the Top 3 Objectives will also be useful in providing the 9 Answers. In addition, conduct a Resource Survey (see Chapter 11) to compile a list of people, process, and technology components currently in use, determine the usefulness of each one, and request suggestions for additions. Use this survey to find out which processes and tools are currently popular, identify gaps in meeting user needs, and look for integration possibilities.

Examples

Here is an example of how these questions might be answered in a consulting firm:

People

1. Which job families in your organization need to participate in the KM program?
- Consultants
- Project managers
- Managers

2. What are the different roles that participants will need to play?
- Consultants: need to collaborate as members of project teams and communities of practice
- Project managers: need to reuse content from previous projects an contribute details about new ones
- Managers: need to ensure that consultants and project managers perform their expected roles
- KM leaders: need to provide the required people, process, and technology components

3. Who are the key stakeholders and leaders to line up in support of the new initiatives?
- Senior executive: sponsor program, provide funding, communicate regularly, establish goals, and inspect ongoing performance
- Management team: lead by example, ensure goals are defined, and reward good performance
- Thought leaders: lead communities, endorse processes, and use tools

Process

4. What existing processes need to be modified to incorporate KM activities?
- Project team collaboration: replace ad hoc email and file sharing with use of standard team spaces
- Employee goal setting and reward: add KM-specific goals and rewards

5. What new processes need to be created?
- Capture: collect project information and documents
- Reuse: search for existing content and contacts from previous projects and employ as much as possible in new projects

6. What policies will need to be changed or created to ensure desired behaviors?
- Collaboration: ensure that all project teams use standard team spaces
- Capture and Reuse: ensure that the capture and reuse processes are followed

Technology

7. What existing tools can be used in support of the new initiatives?
- Threaded discussions
- Videoconferencing

8. What new tools will need to be created or obtained?
- Collaborative team spaces
- Structured repositories

9. What integration of tools and systems will be required?
- Threaded discussions with email, search, and GenAI
- Collaborative team spaces and structured repositories with email, search, and workflow

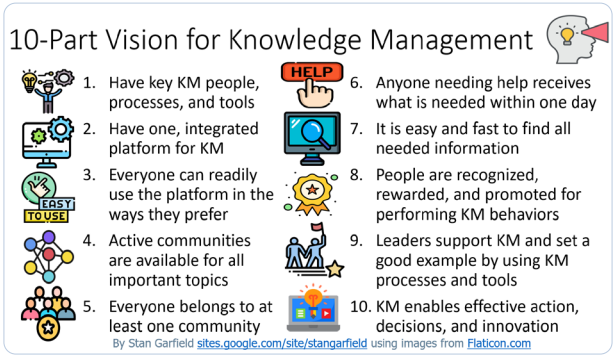
Planning a KM initiative includes determining who will participate, which processes and tools are required, and how tools should be integrated. Take the time to do this carefully in the planning stage, so that you don't have to spend more time later dealing with problems.

Chapter 5: Articulate Your Vision

STEP 5: Articulate your vision. You must be able to passionately describe the end-state vision for your program. What does KM look like when it's working? Establish a vision for how knowledge management should work, and relentlessly work towards making that vision a reality.

Here is my vision for how knowledge management (KM) should work.

1. People, process, and technology elements are in place to enable everyone to conveniently Share, Innovate, Reuse, Collaborate, and Learn.
2. A single global platform is available, with access to community sites, websites, team spaces, content repositories, and collaboration tools.
3. Everyone can interact with the platform in the ways they prefer, including entirely by email, mobile client, desktop client, web browser, RSS feed, etc.
4. A unique global, cross-functional community is available for each major specialty, role, and focus area, with a website, a calendar, frequent events, useful news and content, and active discussions.
5. Everyone belongs to at least one community, including the one most closely aligned to their work, and pays attention to the community's discussions and activities.
6. Anyone needing help, an answer to question, content, an expert, or information on what the firm has done and can do can post in a community's threaded discussions or the Enterprise Social Network (ESN) and receive a helpful reply within 24 hours.
7. Everyone can easily find, follow, be made aware of, and share what is going on in the ESN, activity stream, blogosphere, content repositories, etc.
8. People are recognized, rewarded, and promoted if they Share, Ask, Find, Answer, Recognize, Inform, and Suggest, and leaders set a good example by doing so themselves.
9. What one part of the firm knows, the rest of the firm knows; different parts of the firm routinely work together; ideas are solicited and implemented; high levels of trust and transparency exist; leadership engages with all levels of the firm's members; people Work Out Loud and interact with people they didn't know before; and individuals learn effectively.
10. Decisions are made quickly and effectively, it's easy to find information and resources, open communications are made frequently and widely, redundant effort is avoided, mistakes are not repeated, scarce expertise is made widely available, clients see how knowledge is used for their benefit, sales and delivery are accelerated, innovation and growth are stimulated, morale is high, and the firm's reputation is strong; as a result, the firm thrives.



There are many examples of KM visions. You can certainly adapt these, but the vision you create should be specific to your organization and should be one that you can articulate passionately at any time.

Here are the KM visions of others.

1. Kent Greenes: One learns and everyone knows. Individuals, groups, and organizations share, transfer and apply their collective knowledge and experience to do what's right AND deliver extraordinary performance. What good KM looks like:

- Reflective practitioners and leaders: self-guided learners, seekers and sharers of knowledge are sought after and highly rewarded. Everyone is highly participative in knowledge networks and communities.
- Work is learning and learning is work: knowledge is embedded in processes and practices, and it's all transparent.
- People are highly aware of their digital presence: it's easy and fast to find and collaborate with relevant people and content.
- Stakeholders are aligned with common intent: People, Process, and IT.

2. (the late) Bill Ives: KM has potential to become a core value driver within the connected enterprise.

- Almost any human interaction that can be conducted electronically can be made social, but few of the potential uses have been developed.
- This is where KM can play a leadership role.
- KM needs to be integrated into task-oriented social functions to realize the enormous potential value.

3. Chris Collison: You know knowledge is being effectively managed when there is:

1. *Leadership*. Leaders in the organization are role models, challenging people to ask for help, seek out, share and apply good practices. This inspires curiosity and a commitment to improve. The organization is learning!
2. *Learning*. People instinctively seek to learn before doing. Lessons from successes and failures are drawn out in an effective manner and shared openly with others who are genuinely eager to learn, apply and improve. Lessons lead to actions and improvement.
3. *Networking*. People are actively networking, seamlessly using formal communities and informal social networks to get help, share solutions, lessons and good practices. The boundaries between internal and external networks are blurred, and all employees understand the benefits and take personal responsibility for managing the risks.
4. *Navigation*. There are no unnecessary barriers to information, which is shared by default and restricted only where necessary. Information management tools and protocols are intuitive, simple and well understood by everybody. This results in a navigable, searchable, intelligently tagged and appropriately classified asset for the whole organization, with secure access for trusted partners.
5. *Collaboration*. People have the desire and capability to use work collaboratively, using a variety of technology tools with confidence. Collaboration is a natural act, whether spontaneous or scheduled. People work with an awareness of their colleagues and use on-line tools as instinctively as the telephone to increase their productivity.
6. *Consolidation*. People know which knowledge is strategically important and treat it as an asset. Relevant lessons are drawn from the experiences of many and consolidated into guidelines. These are brought to life with stories and narrative, useful documents and templates, and links to individuals with experience and expertise. These living knowledge assets are refreshed and updated regularly by a community of practitioners.
7. *Social Media*. Everybody understands how to get the best from the available tools and channels. Social media is just part of business as usual; people have stopped making a distinction. Serendipity, authenticity and customer intimacy are increasing. People are no longer tentative and are encouraged to innovate and experiment. The old dogs are learning new tricks! Policies are supportive and constantly evolving, keeping pace with innovation in the industry.
8. *Storytelling*. Stories are told, stories are listened to, stories are re-told and experience is shared. People know how to use the influencing power of storytelling. Narrative is valued, captured, analyzed, and used to identify emergent patterns which inform future strategy.
9. *Environment*. The physical workplace reflects a culture of openness and collaboration. Everyone feels part of what's going on in the office. Informal and formal meetings are easily arranged without space constraint, and technology is always on hand to enhance productivity and involve participants who can't be there in person.
10. *Embedding*. Knowledge management is fully embedded in people management and development—influencing recruitment and selection. Knowledge-sharing behaviors are built into induction programs and are evident in corporate values and individual competencies. Knowledge transfer is part of the strategic agenda for HR. The risks of knowledge loss are addressed proactively. Knowledge salvage efforts during hurried exit interviews are a thing of the past!

4. Al Simard

- Knowledge is the core strategic resource.
- Knowledge flows efficiently from creation to application.
- Knowledge work is productive and leveraged for multiple uses.
- Knowledge products and services support organizational competitiveness.
- Learning and adaptation ensure organizational sustainability.

5. Neil Olonoff

- People are respected and trusted.
- Their tacit knowledge is accepted as the key source of value in the organization.

6. Giovanni Piazza: One global community:

- United by an uninterrupted flow of information.
- Connected beyond boundaries.
- Enabled by world-class technology.
- Sharing the daily product of its efficient practice.
- Open to the influx of worldwide content.

7. Jack Vinson: If it's working well in an organization, I would expect to see evidence like:

- People asking "dumb" or "naive" questions and getting useful answers from people they don't necessarily know.
- Projects (knowledge work) are getting better and better in terms of speed-of-completion.

8. Cory Banks

- They wouldn't know they are doing it: along these lines people wouldn't know that what they are doing is called knowledge management. They do what feels right and what works, and it just so happens that someone else calls that KM.
- Open not closed: we communicate openly and shout it to the void. We believe that others might have a better idea or be able to take your idea and improve on it. We are open to taking others' needs and ideas and building on those. We monitor the feed/stream and see where we can contribute.
- Supportive: people keep an eye out for each other and offer assistance when needed. They are not dominated by achieving their own personal targets but are focused on a higher level of success for the project, team, group, organization, community.
- Information-literate: people know where to find what they need and know who to go to. Good communication, cooperation and collaboration are inherent.

- They are successful! The organization and its people make better decisions and provide innovative solutions that set them apart from competitors/peers. They engage with their colleagues, customers, consumers and partners to solve problems.

9. Matt Moore: I'm interested in what people complain about, because when things are working well, no one says anything. What would I like people to complain about? For example:

- People can find me too easily. And they seem to know what I'm good at and what my experiences have been. It's unnerving.
- We can quickly identify gaps in our information base - and I don't like finding gaps.
- We seem to be sharing a lot of our IP among ourselves – and sometimes with our customers and partners. I'm worried about the leakage risks.

10. Karla Phlypo-Price

- I see an item on every community agenda regarding learning and knowledge transfer or creation. By virtue of seeing the words knowledge transfer or creation, I know that the culture has integrated learning, and cares about how knowledge flows.
- I see common usage of words among cross-functional groups when collaborating. This means that there has been an effort to understand diverse perspectives of others outside their community.
- I see a clear appreciation for context within knowledge exchanges.
- I see an understanding that sometimes explicit knowledge needs to be captured (e.g., when dealing with technical understanding), and evidence of some kind of repository that is common for all to use, update and contribute to.
- I see upper management openly using the same methods as everyone else. Running their meetings with the same agenda items contributing to explicit knowledge. Promoting wisdom and incorporating the wisdom from many voices.
- I see a list by specialization on a shared intranet that has all the experts, enthusiasts, etc., so that others can find them easily.

11. Dean Testa: I like to keep things simple. Our vision is "Collect and Connect to provide associates the entire knowledge of the organization available at their fingertips."

12. Tom Short

- Work gets done easily and well.
- There is a continuous wellspring of new ideas that lead to more efficient ways of working, less waste and increased revenue.

13. Kate Pugh: I would like to see the following measurements show positive indicators:

- Lives saved
- Budgets salvaged
- Schedules met
- Jobs spared
- Innovations to market
- Risks mitigated
- Knowledge networks spreading good global health practices
- Laughter
- People going home at night at a reasonable hour, without redoing what's being done elsewhere around the globe

14. Marc de Fouchécour: A knowledge-powered organization is an organization where all people *Rip*, *Mix*, *Burn*, and *Thank*:

- *Rip*: gather pieces of information, ideas, news, conversations
- *Mix*: them individually or collectively for my/our purpose or goal and with my/our own context and culture
- *Burn*: (like a CD) transform this knowledge in concrete actions or decisions
- *Thank*: recognize my sources of information and inspiration in order to stimulate them to continue to produce, and use my own results (KM process becomes a cycle)

15. Peter West: KM is working really well for an organization when:

- The organization creates the conditions (and continues to refine them – in anticipation of or response to new developments) whereby its members and their stakeholders have access to (or the capacity to create) the knowledge they need to make decisions and take actions that add value to the organization and its stakeholders/shareholders.
- The "conditions" vary according to organizational/situational context and applicability, but could include (in multiple combinations and permutations): establishing communities of practice; supporting mentorship/apprenticeship programs; encouraging storytelling; experimenting with safe-fail interventions; sharing good practices, convening a knowledge fair, etc.

16. Paul McDowall: The tangible outcome of effective use of KM principles and practices:

- The organization is widely recognized as being highly effective and efficient, both strategically and operationally, in that it achieves or exceeds its strategic goals; responds to or anticipates market changes and conditions; manages all assets and resources prudently, and demonstrates creativity; innovation; adaptability and flexibility with continuous improvement. Knowledge and healthy communication flow afferently and efferently as the key mechanism in doing work. Knowledge Management practices and principles are used and lived as essential aspects of the organizational culture ("the way we do things around here").
- Customers and clients highly value the products and/or services, and a strong and meaningful relationship is evident between them.
- Stakeholders and partners highly respect the organization and are keenly engaged in the active partnerships and relational activities, especially where ideas flow.
- Leaders and managers make effective and timely decisions based on better knowledge and ideas, drawing on sound analysis and insight from all relevant individuals or groups in the organization.
- Employees are highly engaged intellectually, emotionally and socially. Mutual respect between management and staff is evident.

17. Richard Vines: People and organizations, individually and collectively, have the cognitive clarity to articulate the:

- Capabilities they draw upon.
- Approaches they use.
- Systems they continuously reform.
- E-platforms that enable them to acquire, apply, create and store knowledge, for contexts such as realizing shared visions or minimizing the impact of disruptions.

18. Joel Muzard: Our point of view is that:

- Knowledge is something alive, organic, a stream that flows between people who are facing a challenge or are in any disturbance or disruption in a specific context, with shared language and values that enables them to reach their purpose efficiently, expertly, with fun.
- Our organization is an ecosystem where the solutions are co-constructed with commitments in real time and without barriers, and leaders act as conveners, motivators and facilitators of agile conversations.

19. John Hovell

- Elevator pitch: "When you've been working on a project for 3 months and focusing on it every day, have you noticed that more than half the time someone somewhere else is usually working on something similar? You should try our new talent market - it really does a great job of connecting people, projects and capabilities." Of course, talent markets aren't the only KM deliverable, so you might need a broader example – or 20 more of these pitches depending upon your business need.
- You know KM is working when the organization can continually answer "who knows who?", "who knows what?" and "who does what?" It's not the end-all, be-all model, but I sure think it's apropos of today's most typical organizational challenges, i.e., the kinds of challenges that aren't necessarily owned by a particular function. It seems as though a model like that offers each organization an opportunity to define exactly how they'll answer those questions to best fit their customer needs, strategy and culture—whether it's talent markets and knowledge markets, or board meetings and discussion threads, or communities of practice and virtual worlds, etc.

20. Steven Wieneke: For a learning and knowledge aware enterprise, knowledge is:

- Shared, not horded
- Adopted, not ignored
- Adapted, not applied blindly
- Reused, not discarded
- Leveraged, not reinvented
- Innovated, not stagnated
- Valued, not taken for granted
- Accurate, not incorrect
- Apparent, not assumed
- Visible, not hidden
- Accessible, not limited
- Current, not dated
- Relevant, not unrelated
- Understood, not vague
- Actionable, not generalities
- Active, not passive
- Perennial, not occasional

21. Arthur Shelley: What does good KM look like?

- People naturally collaborate and have extensive global networks
- Leaders support their teams' collaboration activities across business and with external parties
- There is a high level of adaptation and adoption of other's ideas
- Sharing behavior is acknowledged and rewarded
- Tools enable learning before, during and after activities and events
- Networks and communities are self-sustaining and refresh knowledge as they complete projects and rotate leader and administrative roles
- Community activities are driven by business needs and deliver benefits, both tangible and intangible
- Knowledge behaviors are embedded into everyday business processes
- Intellectual property is defined and made available for others to use
- Learnings from change programs are captured and reused in, or adapted for, related future projects
- Information and knowledge is constantly refreshed and easily accessed by appropriate parties

My vision relies upon trust and a commitment to the following:

- Improving quality of care by referral to the evidence base
- Creating a reflective learning culture
- Research being embedded within the core business
- Developing the talents of all staff
- Working with partners
- The use of innovative information and communications technology

Example from HP

Strategy Vision

1. All projects begin by reusing institutionalized knowledge from standard solutions, and content from previous, similar projects.
2. All projects submit reusable content to the appropriate repositories at standard milestones during the project lifecycle, from bid approval through project closeout.
3. Total Customer Experience and Quality are improved through KM.
4. Profitability increases through better reuse.
5. Useful information is delivered to users when they need it based on the work that they are doing without the need for explicit searches or requests.
6. It is easy for any question to be asked or any problem to be posed such that a useful answer or solution is provided rapidly and effectively, regardless of the location of the requestor, the time of day, or the difficulty of the request.

Structure and Processes Vision

1. The Knowledge Capture and Reuse (KCR) Process is integrated with the Customer Engagement Roadmap, Bid and Proposal Management, Customer References, Global Method, and all related processes, policies, and procedures such that it is transparent to the users.
2. All project teams follow the standard collaboration process, including the use of team spaces, feeding KCR, and ending with the archiving process. All projects are in the Project Profile Repository with full metadata.
3. A Proven Practice Replication process is actively used.
4. Information flows are automated between all systems and tools, including time reporting, resource management, project reporting, business management, proposal development, etc. so that no data needs to be re-entered and databases are automatically loaded and updated.
5. Standard proposal templates, service kits, and other reusable collateral are readily available for all solutions.
6. Users can access the knowledge they need from outside the HP firewall.
7. Quality Assurance is done on all reusable content.

Metrics, Results, and Rewards Vision

1. Individually oriented measurements to increase reuse are in place for all employees, managers, and senior leaders, and results are carefully inspected during performance reviews.
2. Knowledge sharing and reuse is rewarded significantly, regularly, consistently, and visibly.
3. Time spent on knowledge sharing and reuse may be counted as utilization at the individual level.
4. Time spent on knowledge sharing and reuse is built into all project bids so that it is paid for by the customer as a normal part of project delivery.
5. Employee promotions are partially based on knowledge sharing and reuse, and everyone knows this.
6. A standard reporting process is used for operational, user, management, and metric, and recognition reporting.

Values and Behavior Vision

1. Managers regularly inspect, talk about, and directly participate in knowledge sharing and reuse.
2. All employees belong to and regularly participate in at least one Community of Practice.
3. All project teams collaborate using SharePoint team sites.
4. Project managers submit a project profile for each project.
5. Before beginning any new project, employees search the Project Profile Repository to find out where we have done something similar in the past, and reuse as much content as possible from previous projects.
6. Employees regularly submit and download Knowledge Briefs.
7. Training is provided to new hires, Professions events such as Project Management University, webinars, etc. on an ongoing basis, including basics and updates. Web-based training is available for self-paced instruction. Introductory training on KM is mandatory.

Chapter 6: Define the KM Strategy

STEP 6: Define the KM strategy. These are specific actions that will be taken to implement the program.

For each of the Top 3 Objectives, list the specific actions that can be readily communicated to the organization. This will allow everyone to understand exactly what will be done, what they are expected to do, and what's in it for them.

There are ten basic categories of KM strategy: motivate, network, supply, analyze, codify, disseminate, demand, act, invent, and augment. Use these as a guide for formulating your list of actions.

1. Motivate

To enable knowledge-related actions, it is usually necessary to provide incentives and rewards to your targeted users to encourage the desired behaviors. Often, the first step will be a change management program to align the culture and values of the organization to knowledge management. Setting goals and measurements that individuals and managers must achieve is also important. And establishing formal incentives and rewards will reinforce the goals and measurements.

The means of motivating employees include communicating to them, modeling expected behaviors, establishing standard goals to be included in all performance plans, monitoring and reporting on progress against organizational goals, recognizing those who demonstrate desired behaviors, providing incentives for meeting objectives, and rewarding outstanding performance.

Examples include town hall and coffee talk sessions conducted by senior leaders, notes from senior leaders to employees who contribute reusable content, standardized performance goals, monthly progress reports, and awards for those who set the best example of sharing their knowledge.

For details, see Chapter 21.

2. Network

A fundamental way for knowledge to be shared is through direct contact between people. Connecting to others who can provide assistance or who can benefit from knowledge sharing is a powerful way to leverage each person's individual knowledge. Communicating across organizational silos allows good ideas to be exchanged between groups who might otherwise be unaware of each other. Collaborating within communities allows the members to learn together, which is enabled by community events, threaded discussions, and team spaces.

Building and expanding social networks creates valuable links between individuals and groups. Social software supports these networks through adding connections, identifying shared interests, and tagging resources.

Conversations between people are the basis of building trust, gaining insights, and sparking new ideas. Storytelling ignites action, builds trust, instills values, fosters collaboration, and transmits understanding. The Knowledge Café and World Café methods help us appreciate the importance and connectedness of the informal webs of conversation and social learning through which we discover shared meaning, access collective intelligence, and bring forth the future.

3. Supply

There must be a supply of knowledge in order for it to be reused. Supply-side knowledge management includes collecting documents and files, capturing information and work products, and storing these forms of explicit knowledge in repositories. Tacit knowledge can also be captured and converted to explicit knowledge by recording conversations and presentations, writing down what people do and say, and collecting stories.

Examples of supply strategies include project databases, skills inventories, and document repositories. The content that is captured represents the raw materials. These can then be analyzed, codified, disseminated, queried, searched for, retrieved, and reused.

A supply-only strategy will not be very useful to an organization. Even if every possible document and knowledge object is captured and stored, there is no resultant benefit unless there is significant reuse of all that content. Be sure to keep supply and demand strategies in balance.

4. Analyze

Once there is a supply of captured knowledge, it is then possible to analyze it so that it can be applied in useful ways. Before drawing any conclusions from what has been collected, the content should be scoured to verify that it is valid. Confidential data may need to be scrubbed, or the content may need to be further secured. Lengthy documents may need to be summarized, encapsulated, or condensed.

Reviewing collected information may reveal patterns, trends, or tendencies that can be exploited, expanded, or corrected. Distilling data to extract the essence leads to discovering new ideas and learning how to improve. Knowledge can be harvested in the form of lessons learned, proven practices, and rules of thumb.

Sensemaking is the way in which we make sense of the world so that we can act in it. Dave Snowden describes technologies that process large volumes of data with a view to weak signal detection and pattern recognition. Another kind is naturalistic sensemaking, derived from an understanding of the cognitive processes that underpin human decision making.

People can also be analyzed to reveal useful facts. Social Network Analysis maps and measures relationships and flows between people, groups, or organizations to improve communities, identify missing links, and improve connections between groups. Using Positive Deviance can help find those whose special practices, strategies, and behaviors enable them to find better solutions to prevalent problems than their neighbors who have access to the same resources.

5. Codify

After collected knowledge has been analyzed, it can be codified to produce standard methodologies, reusable material, and repeatable processes. Data can be consolidated, content can be curated, and processes can be collated to yield improved business results.

Codifying knowledge also involves establishing the value of intellectual property, adding metadata to documents stored in repositories so that they can be easily found, and tagging content so that users can discover useful views, connections, and collections.

Examples include designating documents as standard templates, identifying processes and proven practices, and producing a catalogue of official methods. Refining knowledge after it has been captured so that it can more readily be reused renders it in a more valuable state.

6. Disseminate

Even if captured knowledge has been analyzed and codified, it will not be of value unless potential users are aware of its availability. Thus, its existence must be disseminated, both widely to inform all potential users and narrowly to inform targeted consumers.

A variety of communications vehicles should be used to distribute knowledge. Newsletters, websites, and email messages can be used to spread awareness. Blogs, wikis, and podcasts can be visited online or subscribed to through alerts, notification, and RSS feeds. Content can be dispersed through syndication and collected through aggregation, including the ability to personalize websites to display only relevant information.

Examples of knowledge dissemination strategies include providing customized notifications of new or changed content, weekly newsletters featuring new submissions to repositories, and a KM corner on the organization's home intranet page listing the top 10 most-reused documents for the current month. Monthly podcasts featuring interviews with thought leaders, weekly calls featuring conversations about lessons learned, and email messages sharing proven practices are also good ways of increasing awareness.

7. Demand

Demand is the other side of supply. It involves searching for people and content, retrieving information, asking questions, and submitting queries.

Demand-driven knowledge management takes advantage of networks, supply, analysis and codification. It is stimulated by dissemination and enabled by making it easy to find resources.

Examples of demand strategies are expertise locators, ask the expert processes, search engines, and chatbots. User assistance and knowledge help desks can help connect supply and demand by answering questions, providing support, and searching for content. Specific tools and techniques that enable demand for knowledge include GenAI chat, e-learning systems, threaded discussions, and Appreciative Inquiry.

Focusing more on just-in-time knowledge management and less on collection, content can be provided at the time of need through networks such as communities. By only supplying information that is actually required, unnecessary knowledge capture can be avoided and time and resources used more efficiently.

8. Act

Peter Drucker is widely quoted as saying "The knowledge that we consider knowledge proves itself in action. What we now mean by knowledge is information in action, information focused on results." The payoff for motivating, networking, supplying, analyzing, codifying, disseminating, and demanding knowledge is results through action. Peter Senge is quoted as defining knowledge as "the ability to make effective decisions and take effective action."

Making better decisions is supported by networks and analysis. Implementing changes to replicate proven practices and improving processes based on previous experience are also enabled by analysis.

Incorporating knowledge into routine workflow and utilizing processes and procedures can be done as a result of codification. Disseminating what has been learned allows it to be applied to new situations. Responding to requests, answering questions, and using and reusing content are actions that result from demand.

Responding, deciding, and reusing are good examples of acting as part of a knowledge management initiative. Another form of action is the next strategy – invent.

9. Invent

A special kind of action is invention. Creating new products and services, generating new ideas to try out, and developing innovative methods and processes can help transform an organization, industry, or a nation.

Generating new sources of customer demand, stimulating personal and organizational growth, and rethinking the existing rules of the road can help an organization develop, thrive, and endure. Failure to do so may lead to stagnation, decay, or death.

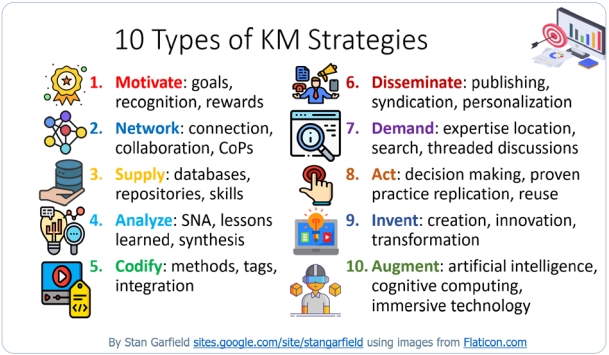
Knowledge management can help trigger the imagination by providing a continually replenished source of ideas and experiences. People help bring out the best ideas in each other through their interaction as a part of networks. Publishing white papers stimulates creative thinking. Analyzing collected knowledge reveals patterns and opportunities for new developments. Enabling curiosity to lead to creativity and then to knowledge creation is a powerful role that KM can play.

10. Augment

Artificial intelligence can perform operations analogous to learning and decision making in humans. Intelligent personal assistants can recognize voice commands and queries, respond with information, or take desired actions quickly, efficiently, and effectively. Generative AI (GenAI) is capable of generating text, images, synthetic data, or other media, using generative models.

Immersive technologies allow a person to feel part of an artificial, simulated environment. Virtual reality (VR) completely replaces a user's surroundings with a digital environment using a head-mounted display (HMD) with two near-eye displays, one for each eye. Augmented reality (AR) creates an immersive experience for users by blending the real with the virtual. Haptic technology involves tactile feedback including pressure, vibrations, and movements.

Using these approaches can enhance the capabilities of humans by augmenting their powers of observation, analysis, decision making, processing, and responding to other people and to routine or challenging situations. Expert systems, AI tools such as IBM Watson; GenAI tools such as ChatGPT, Claude, Google Gemini, Microsoft Copilot, Meta AI, and DeepSeek; and intelligent personal assistant tools such as Amazon Alexa, Apple Siri, and Google Assistant can be used to extend the ability of humans to understand, decide, act, learn, and avoid problems.



Examples

Here are examples of possible KM strategies for three different types of organizations. Typically, not all ten types of strategies will be used, but these examples illustrate what might be considered.

1. Non-Profit Organization

- Top 3 Objectives
  1. Lower costs by preventing people from reinventing the wheel.
  2. Eliminate deficits caused by repeating the same mistakes.
  3. Increase contributions by innovating and creating new capabilities.

- KM Strategy
  1. Motivate: provide incentives for sharing and reusing proven practices.
  2. Network: create communities of practice to enable sharing and to stimulate new ideas.
  3. Supply: collect stories on both failures and successes.
  4. Analyze: look for patterns and trends in previous work and select proven practices from the collected stories.
  5. Codify: develop standard processes to follow.
  6. Disseminate: publish standard processes to the intranet and distribute proven practices in a monthly newsletter.
  7. Demand: use communities to ask questions about how to perform tasks and allow searching the proven practice repository.
  8. Act: follow the standard processes and reuse proven practices on new opportunities.
  9. Invent: create new sponsorship opportunities and develop improved fund-raising techniques.
  10. Augment: use GenAI for recommending donors and for interacting with them.

2. Manufacturing Company

- Top 3 Objectives
  1. Increase orders by better collaboration between sales, services, and back-office functions.
  2. Increase revenue by stimulating a flow of ideas for new products and services.
  3. Increase profits by sharing and reusing lessons learned.

- KM Strategy
  1. Motivate: reward collaboration, submitting new ideas, and sharing and reusing lessons learned.
  2. Network: enable cross-functional collaboration.
  3. Supply: capture lessons learned and suggestions for new products and services.
  4. Analyze: select best lessons learned and suggestions.
  5. Codify: categorize and tag selected lessons learned and suggestions.
  6. Disseminate: send out lessons learned in email messages and publish blog entries about new ideas.
  7. Demand: provide query capability for lessons learned database.
  8. Act: reuse lessons learned.

9. Invent: develop new products and services through collaboration and submitted ideas.
10. Augment: use AI for designing, engineering, and building new products.

3. Consulting Firm

- Top 3 Objectives
  1. Increase win rate by improving the proposal development process.
  2. Lower sales and delivery costs by reusing proven practices.
  3. Increase engagement quality by collaborating with customers and partners.

- KM Strategy
  1. Motivate: measure and reward collaboration, sharing, capture, and reuse.
  2. Network: get all consultants and project managers to collaborate on projects, actively participate in communities of practice
  3. Supply: capture proposals and other project documents for all projects.
  4. Analyze: select proven practices from contributed project documents.
  5. Codify: ensure metadata is attached to submitted documents, and cleanse proposals to use as standard templates.
  6. Disseminate: make it easy for everyone to find reusable content, methods, tools, templates, techniques, and examples.
  7. Demand: search for proven practices and proposal templates for each new project.
  8. Act: reuse proven practices and proposal templates on each new project and employ customer and partner feedback to improve project quality.
  9. Invent: use customer and partner feedback to improve existing services and create new service offerings.
  10. Augment: automatically determine the specialties, roles, and interests of consultants and automatically deliver important information relevant to their work at the time of need.

Motivating, networking, supplying, analyzing, codifying, disseminating, demanding, acting, inventing, and augmenting are the ten types of KM actions. Incorporating them in your KM strategy will turn the Top 3 Objectives into specific actions that can be communicated to your organization.

For an in-depth book on the subject, I recommend reading *Designing a Successful KM Strategy: A Guide for the Knowledge Management Professional* by Stephanie Barnes and Nick Milton. For a different take on creating a KM strategy, I recommend attending Dave Snowden's Workshop W11: KM Strategy at the annual KMWorld Conference.

Chapter 7: Define Compelling Use Cases

STEP 7: Define compelling use cases with clear advantages over existing alternatives. Don't talk about adoption or rollout of a tool. Talk about the advantages of using it over existing alternatives. Explain to your target population what's in it for them.

The Knowledge Management ***SIRCL*** can be used to start communicating KM use cases. Knowledge management enables:

- ***Sharing***: an activity through which information or expertise is exchanged between people within or between organizations and communities.
- ***Innovating:*** the process by which an idea is translated into a good or service for which people will pay.
- ***Reusing***: using a process, an approach, or a knowledge object again after it has been used before – in particular, what others have already learned, created, or proved – to save time and money, minimize risk, and be more effective and efficient.
- ***Collaborating***: interacting with peers and colleagues to exchange ideas, share experiences, work together on projects, and solve problems.
- ***Learning***: the act of gaining knowledge from others, from existing information, and by doing.

You can also use ***COLLABORATION*** as an acronym that includes 13 use cases that are more specific than just asking people to collaborate.

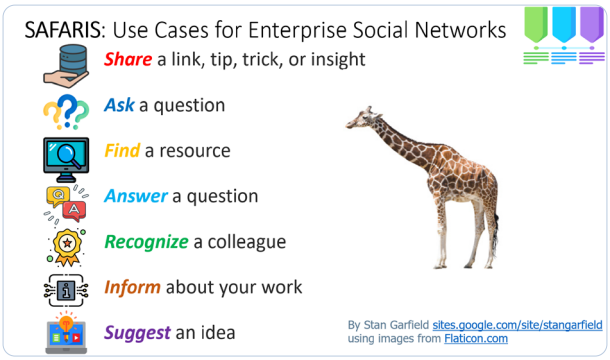
- ***Communicate:*** Inform the organization about your activities, plans, and progress. Interact with colleagues. Solicit input, feedback, and advice. Relax, refresh, relieve tension, and laugh.
  - "I will be the project manager for the conversion effort."
  - "Here is the statement of work for the project plan."
  - "I'm looking for feedback on the plan."
  - Schedule a group dinner at an upcoming conference.
- ***Obtain***: Gain assistance from others. Find out what others are doing. Retrieve information. Receive answers to questions.
  - "I can use some help in setting up the meeting room for our monthly meeting."
  - "How are all of you dealing with the upcoming software migration?"
  - Reuse a proposal from the document library.
  - "Here is a link to a presentation you can use."
- ***Locate:*** Find subject matter experts. Find documents, references, sites, official methods, lessons learned, and proven practices. Find needed resources.
  - "I'm looking for a network security specialist to join a new project."
  - "Does anyone have a tool I can use for Social Network Analysis?"
  - Look in the community's threaded discussion archives to find a relevant solution.
- ***Learn***: Master a subject. Deepen expertise in a specialty. Keep current on the latest news in a topic.
  - Participate in a training event.
  - Attend a community call featuring a presentation on a topic of interest.
  - Read a community newsletter for the most recent updates.
- ***Assist***: Respond to a request. Respond to a request for information, proposal, or support. Submit a proposal. Deliver a product, project, or service. Provide advice, guidance, and thought leadership.
  - "The attached document provides the answer to your question."
  - Offer to get on a call to help solve a problem.
  - Develop a grant proposal based on content from a knowledge repository.
  - Deliver a service as part of a team.
  - "Based on my experience, I suggest that you follow the steps outlined in the document linked to below."
- ***Build***: Develop and deliver thought leadership in the form of advice, writing, presentations, audio recordings, or videos. Write a document or create a presentation. Record a podcast or a video. Create and deliver a product or service.
  - Publish a white paper on a new methodology you helped develop.
  - "I am sharing the chat transcript of my notes from last week's conference."
  - "Here is the recording of today's community call."
  - Collaborate to create a new service.
- ***Offer***: Answer questions. Provide points of view, proven practices, lessons learned, examples, or official methods. Get assigned to a project. Lead an effort. Praise, recognize, and thank colleagues.
  - "I experienced that same bug and discovered this workaround."

- "My view is slightly different, based on my time working in South America."
- "I am a user experience designer available to join a project immediately."
- Serve as project manager for an initiative.
- "I would like to thank everyone who contributed to the discussion. Your insights were most valuable in helping me decide what to do next."

- ***Resolve***: Identify issues. Solve problems. Fix something that is broken.
  - Work with others to create a list of important issues.
  - Provide a peer assist to solve a problem faced by a community member.
  - "We fixed the bug that prevented search from returning recent results."
- ***Ask***: Pose questions. Request advice. Submit a query or request.
  - "What is the best way to record a podcast?"
  - "How have you been able to convince senior leaders to provide funding?"
  - "I need help in migrating to a new platform."
- ***Transfer***: Transmit knowledge. Share links, insights, lessons learned, tips, tricks, and techniques. Contribute reusable content. Submit documents.
  - Lead a training session.
  - "I am posting a link to an article I recently published."
  - "I will present the new methodology on this month's community call."
  - "The project artifacts are now available in the document repository."
- ***Innovate***: Develop new and better ways of doing things. Solicit ideas. Manage the innovation process. Improve existing products, services, processes, and tools. Invent new products, services, processes, and tools.
  - Work with others to improve the service desk call handling process.
  - "What features should be part of the new platform?"
  - Conduct an innovation challenge using threaded discussions, community calls, and a wiki.
  - "Please review the list of suggestions and vote on the top three."
  - Participate in a task force chartered to develop a new service to replace an old one.
- ***Onboard***: Induct new hires or team members into the organization. Get oriented as a new hire or team member. Orient new users.
  - Offer help to people who have just joined the organization.
  - Attend an event where experiences are shared with new team members.
  - "Please sign up to help present at next month's new user orientation session."
- ***Network***: Connect to others with similar interests. Work together as part of a team. Connect multiple organizations to deliver services as one.
  - Invite a community member whose posts have been helpful to meet up for a chat.
  - "I am looking for volunteers to work on the annual meeting."
  - Pull together members from different parts of the organization to deliver services.

Another acronym, ***SAFARIS***, can be used to promote seven key uses for communities and Enterprise Social Networks. Each of these is more effective and efficient than alternative approaches, and that is the strength of offering use cases.

- **Share** a link. "Here is a link to the recording of the most recent Lucidea webinar."
- **Ask** a question. "Has anyone encountered this problem before, and if so, how was it solved?"
- ***Find*** a resource. "I'm looking for a specialist in artificial intelligence to help in a project."
- **Answer** a post. "Here are links to three relevant documents in the knowledge repository."
- ***Recognize*** a colleague. "Thanks to Janet Johnson for helping me solve a difficult problem."
- **Inform** about your activities. "I am working on updating the enterprise taxonomy, so suggested changes are welcome."
- **Suggest** an idea. "I think we should add a button next to each document in the repository to click on if it was useful."



Chapter 8: Define Program Governance

STEP 8: Define how the KM program will be governed. This includes:

1. Roles and job descriptions for KM leaders, project leaders, and knowledge assistants
2. Composition of program staff, virtual teams, and leader communities
3. Objectives and schedules for recurring calls and meetings
4. Processes for creating and updating the plan of record and schedules for implementation, new releases, and reporting
5. Process for decision making

1. Roles and job descriptions for KM leaders, project leaders, and knowledge assistants

KM Leaders

A knowledge manager should be assigned to lead the KM efforts of an entire organization, or any group within an organization. In this role, they will be the KM leader for their group. In the ideal case, this is a full-time job, but in some cases for smaller groups, it may be a part-time role.

Appoint an organization KM leader, and group KM leaders for each key group within the organization. Groups include regions, large countries, business units, functions, and major work teams.

A KM leader needs to perform the following tasks.

1. Improve business results by institutionalizing a knowledge sharing culture. With the help of the senior executive and the other leaders in the organization, take steps to achieve a positive culture which rewards caring, sharing, and daring.
2. Define, maintain, and execute the KM implementation plan for the organization. This is the overall program plan for the KM initiative.
3. Define, communicate, and implement people, process, and technology components for sharing, innovating, reusing, collaborating, and learning. These are the core elements that enable the KM program.
4. Define KM measurements and rewards for the organization and KM goals for all relevant members. This aligns individual and organizational objectives.
5. Report regularly on the organization's performance against KM metrics. This lets the leadership team know how the program is progressing.
6. Implement action plans for people, process, and technology projects. These are the detailed implementation plans for each project leader.
7. Lead the organization's KM teams. These include the program staff, the core team, and the KM community.
8. Manage the organization's KM communications. This keeps all users informed on the program.
9. Actively participate in communities. Model the desired behaviors by being visible as a leader and member of multiple internal and external communities.
10. Network with other KM Leaders. Demonstrate the use of social networks to stay current in the field of knowledge management.

Here is the profile of an effective KM leader.

Experience

1. Management: supervised people, led work teams, managed a business or functional unit
2. Project management: successfully managed projects to meet deadlines, provide deliverables, and adhere to budgets
3. Communications: published documents, gave presentations, and managed communications programs
4. 50 KM Components: for many of these, performed evaluations, led implementation projects, and used them regularly
5. Reputation: has earned the respect of people both inside and outside of the organization based on accomplishments, networking, and communications

Skills

1. Leadership: able to influence others, lead work teams, and manage projects
2. Communications: excellent at writing, speaking, presenting, and using a variety of communications vehicles
3. Process and Technology: able to quickly learn and master a wide variety of tools and processes
4. 50 KM Components: expert at using many of these
5. Analysis: able to seek input, analyze information, consider alternatives, and make good decisions

Attributes

1. Adaptable
   - Flexible: willing to try different courses of action
   - Resilient: overcomes difficulties, withstands setbacks, and meets challenges
   - Open-minded: considers the opinions of others

2. Assertive
   - Takes initiative
   - Consistently achieves challenging objectives and meets commitments
   - Makes effective decisions in a timely manner

3. Calm

   1. Maintains a high level of performance even when under pressure
   2. Even-tempered even when dealing with unpleasant circumstances
   3. Balances logic and emotions when interacting with others

4. Client-focused
   - Understands clients' needs and concerns
   - Responds promptly and effectively to client needs
   - Eager to be of help to users

5. Creative
   - Develops innovative approaches to problem solving
   - Invents new ways of doing things
   - Willing to try out bold ideas

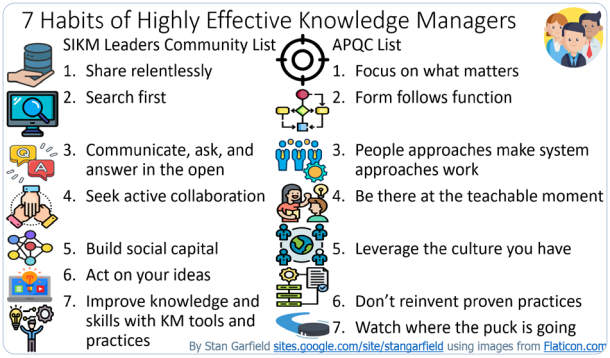
6. Collaborative
   - Acknowledges others' contributions
   - Works effectively with individuals of different backgrounds and from different groups
   - Willing to seek help as needed
   - Shares personal knowledge
   - Builds partnerships and networks

7. Curious
   - Stays current in the field
   - Open to new ideas
   - Asks others to share their knowledge and experience

8. Dynamic
   - Gets results
   - Balances analysis with action
   - Sets high standards

9. Influential
   - Gains support and commitment from others even without formal authority
   - Resolves differences by determining needs and forging solutions that benefit all parties
   - Facilitates teamwork across organizational boundaries

10. Personable
   - Gets along well with many different types of people
   - Nurtures new relationships
   - Well-liked as a manager, employee, and colleague



Project Leaders

Depending on the size of the organization and the available resources, project leaders should be assigned to lead the key efforts included in the implementation plan. Project leaders should report directly to the KM leader for the organization.

The project leaders should work closely together as a team. Projects will regularly overlap between these categories but assign one team member as the leader for each, and enable and lead collaboration on a regular basis.

A project leader needs to perform the following tasks.

4. Define, maintain, and implement their portion of the plan of record for the assigned area of responsibility. This provides the details of the projects planned and being worked on.
5. Report regularly on progress. This keeps other members of the KM community informed on the latest status and the availability of future enhancements.
6. Resolve problems in the assigned area of responsibility. This provides the response to users who report difficulties, malfunctions, and unacceptable performance.
7. Actively participate in communities. This allows desired behaviors to be modeled and connections to be made with users.
8. Network with KM leaders and other project leaders. Use social networks to be aware of prevailing conditions and to be responsive to needs.

If possible, appoint project leaders for people, process, and technology projects. If this is not possible, combine categories based on the backgrounds of the project leaders. Make the extra effort to select strong candidates with solid reputations, since the work that is performed (or not performed) by these people will determine in large part how the overall KM initiative is perceived.

The people project leader serves as the liaison from the KM team to the Human Resources organization to coordinate all HR development and support for KM. They are responsible for all people components.

The process project leader serves as the liaison from the KM team to the operations organization to coordinate all business process and methodology development and support for KM. They are responsible for all process components.

The technology project leader serves as the liaison from the KM team to the Information Technology (IT) organization to coordinate all IT development and support for KM. They are responsible for KM tools, including all technology components.

Knowledge Assistants

Providing a human connection to knowledge sources is important to the success of a KM program. Relying only on automated resources leaves open the possibility that some users may not be able to take advantage of what is available. Knowledge assistants provide support to users by phone, email, chat, or app.

A knowledge assistant needs to perform the following tasks.

1. Help users learn about and use the 50 KM Components. Provide consulting on processes and tools.
2. Facilitate collaboration. Connect people to others who can help them or whom they can help.
3. Direct users to the right knowledge sources based on their specific needs. Locate relevant knowledge resources.
4. Assist users in searching for content and knowledge. Find reusable content.
5. Actively offer assistance to work teams. Engage by contacting users, not just waiting for requests to arrive.
6. Review content submitted to repositories for compliance to quality standards, and follow up as required to improve quality.
7. Solicit user feedback. Direct feedback to the right person within the KM team.
8. Conduct training. Create and record self-paced courses.
9. Search for information to help meet deadlines. Send search results to users who are not connected to the network.
10. Network with other knowledge assistants. Back each other up. Help respond to requests. Take over open requests at the end of the workday based on being in different time zones.

Good knowledge assistants need to be able to relate to others and put them at ease. They should have good communications skills, be able to quickly learn about tools and processes, and be eager to be of help to users. They should have experience in one or more of the following areas: knowledge management, collaboration, help desks, intranet/Internet searching, and peer-to-peer networking.

Appoint an organization knowledge assistant leader to coordinate efforts between all other knowledge assistants. This can be a role assigned to one of the KM leaders in addition to their other duties.

Assign additional knowledge assistants for each key group within the organization. Groups include regions, large countries, business units, functions, and major work teams.

2. Composition of program staff, virtual teams, and leader communities

To manage the KM program, engage the constituents, and ensure alignment with the Top 3 Objectives, the following teams and communities are recommended.

Program Staff: A work team with formal reporting lines. It manages projects, resolves problems, and reports progress. It includes the organization's KM leader and the project leaders.

Core Team: A virtual team, by invitation of the organization's KM leader. It sets the direction of the organization program, debates issues candidly, and makes decisions. It includes the program staff and the group KM leaders.

Knowledge Assistant Team: A virtual team, by invitation of the organization's knowledge assistant leader. It monitors trends, manages performance, and facilitates backup in responding to requests. It includes the organization knowledge assistant leader and all knowledge assistants.

Group Teams (e.g., for a region or business unit): Virtual teams, by invitation of the group KM leader. They set the direction of the group program, debate issues candidly, and make decisions. They include the group KM leader, all KM leaders within the group, and all knowledge assistants within the group.

KM Community: A leader community, open to all within the organization. Its purpose is to share, innovate, reuse, collaborate, learn, communicate, solicit input, and provide feedback on knowledge management. It includes the core team, all other KM leaders, and all knowledge assistants.

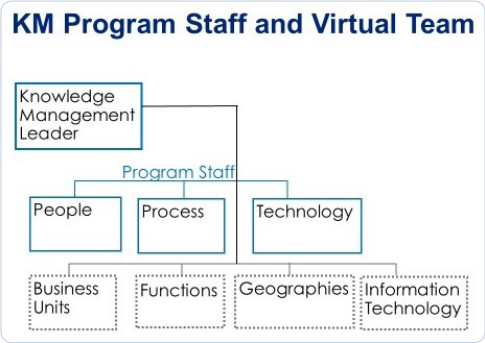
For the program staff, hire strong project leaders. For the core team, influence the managers in the groups to hire strong KM leaders. For the knowledge assistant community, ask all knowledge assistants to participate. For the group teams, the group KM leaders should influence the managers in the subgroups (departments, countries, etc.) to hire strong KM leaders. For the KM community, reach out to as many people as possible who are involved with or have a passion for KM and invite them to join.

Here are three examples of possible group teams.

1. European KM Team: Subgroups are countries within Europe and region-level teams.

2. Human Resources KM Team: Subgroups are functions within HR, such as training, organization development, compensation, etc.
3. Services KM Team: Subgroups are business units within Services, such as consulting, outsourcing, and support.

Create collaborative team spaces for the core team, knowledge assistant team, all group teams, and for the KM community. Create a threaded discussion for the KM community and discourage any KM discussions from taking place outside of this one. Funnel all knowledge sharing, requests for help, and general KM communications through this single threaded discussion. And use it to model behavior for community leadership, participation, and communications.



Sample Org Chart

3. Objectives and schedules for recurring calls and meetings

When you have formed KM teams and communities, you need to decide how and when to meet. Before scheduling calls and meetings, define the objectives for meeting.

Here are suggested objectives from which to select:

- communicate progress
- receive feedback on work
- solicit inputs on future direction
- educate and inform about new ideas, industry trends, and what other organizations are doing
- stimulate discussions
- make decisions
- initiate pilots
- evaluate prototypes
- collaborate on analyzing information, solving problems, and innovating
- share good ideas, success stories, and lessons learned to encourage reuse

After you select your objectives, poll the members of each team with three possible meeting frequencies and durations, and ask them to vote based on their preferences. For example, a weekly 60-minute call, a biweekly 90-minute call, or a monthly 120-minute call.

Once you decide on the frequency and duration of calls, use whatever technology is available to you to make the entire process as smooth as possible. Consider the following possibilities:

- Create a meeting space for the calls and send out recurring meeting invitations.
- Use tools such as Teams, Zoom, or Google Meet for videoconferencing.
- Record the calls and provide playback on demand.
- Post the meeting agendas to the team space, along with copies of presentations and a link to the virtual meeting.

Here are some keys to making regular calls successful.

- Work hard to ensure that the calls are lively by carefully creating agendas, stimulating discussions, and asking questions.
- Schedule dynamic guest speakers, both internal and external.
- Allow any member to add items to the agendas for future calls.
- If agendas don't fill up, suggest topics and speakers until they do.
- Moderate the calls to ensure no background noise, adherence to agenda times, and to regulate discussions.

After the calls have been held for a few months, tune the schedule, duration, and content. You may need to increase or decrease frequency and/or duration. Don't hesitate to do so. This reflects being adaptable, one of the attributes of a good knowledge manager.

One of The 10 Commitments is: Ensure that all KM leaders have the time to do a good job in the role and are allowed to meet in person once a year. And one of the 10 KM Program Priorities (see Chapter 14) is: Get the senior executive to live up to The 10 Commitments. This priority includes: Submit a proposal for the first annual meeting. Another of the priorities is: Hold annual worldwide face-to-face meetings to get all KM leaders informed, energized, and collaborating. Chapter 14 has further details on how the meeting should be structured.

Once your KM community has been formed and met virtually a few times, you can ask them for their inputs on when, where, and for how long to have the first face-to-face meeting. Try to include as many of the key KM leaders as possible but limit the total attendance to no more than 50 to keep the meeting manageable.

If possible, try to rotate the meeting location between different parts of the country or world. To take advantage of the meeting location, invite as many KM leaders as possible who will incur low travel expenses to attend. For example, when meeting in Europe, invite the KM leaders from all of the European countries, but only a few key leaders from other regions.

4. Processes for creating and updating the plan of record and schedules for implementation, new releases, and reporting

The project leaders are responsible for defining, maintaining, and implementing their portion of the plan of record for their assigned areas of responsibility, and reporting regularly on progress. Based on the results of user surveys; inputs from the KM community;

and the details in the Top 3 Objectives List, the 9 Answers, and the KM Strategy, each project leader should select three key projects to lead.

Here are three sets of examples of possible selections.

1. Example: Public Sector Organization

- People
  1. Embed KM goals and measurements into the employee review process.
  2. Develop and deliver training courses, self-paced modules, user guides, and admin guides.
  3. Conduct employee satisfaction surveys to measure progress and identify needed improvements.
- Process
  1. Develop a KM Change Management plan and help implement it.
  2. Define a governance process for repositories and libraries – how content is captured, improved and reused.
  3. Implement a collaboration process for project teams.
- Technology
  1. Define an overall information architecture and data model.
  2. Make it easy to join all communities by clicking on a single button.
  3. Implement a data warehouse for self-service KM indicator reporting.

2. Example: Manufacturing Company

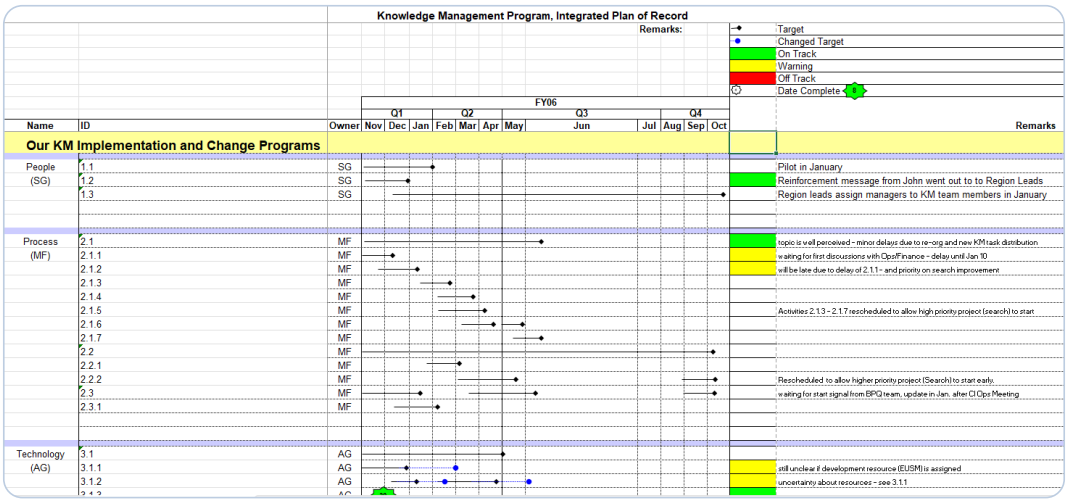
- People
  1. Coordinate a series of regional KM webinars.
  2. Develop, pilot, and roll out an incentive program.
  3. Publish a monthly newsletter.
- Process
  1. Develop a quality improvement plan for repository content.
  2. Implement a process for creating and maintaining a standard taxonomy.
  3. Implement a process to identify and designate proven practices.
- Technology
  1. Automate data flows from business systems to repositories to reduce the need for redundant data entry.
  2. Provide an offline capability for repository content.
  3. Implement a prototype social software tool for personal home pages and social networking.

3. Example: Systems Integration Firm

- People
  1. Improve KM websites and develop new user interfaces that map to different views.
  2. Develop and implement a plan to improve employee satisfaction.
  3. Increase participation in communities and threaded discussions.
- Process
  1. Implement a capture process for software source code.
  2. Implement a reuse process for proposal management.
  3. Define a process for creating and updating sales kits.
- Technology
  1. Integrate repository search with corporate intranet search and add localized search capability.
  2. Add external access to collaborative team spaces for customers and partners.
  3. Automate archival of content from team spaces and repositories.

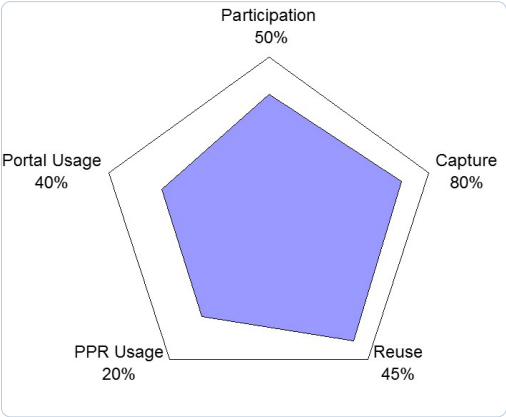
In the recurring core team calls, include a regular time slot on the agenda for reviewing each project leader's portion of the plan of record. The plans should be updated prior to the scheduled calls, including implementation schedule details, timing and features of new releases, and reasons for any schedule changes.

The overall **plan of record** should be maintained on an easily accessible website. It should include the implementation schedule, the new release schedule, the reporting schedule, the change management plan, the training and communications plan, the standard employee goals, the organizational measurements, and the standard taxonomy.



Sample Plan of Record

The core team should decide on the details for reporting. These should include which **metrics** to report, the targets for each metric, the format of reports, what level of detail and how granular reports should be, to whom reports will be distributed, where reports will be stored, how frequently reports will be produced, who will produce reports, how and when to revise metrics and targets, and how to produce custom reports.



Sample Metrics Report

5. Process for decision making

The core team should decide on the details for decision making. These should include a change request process, a process for setting priorities, a voting process, when consensus is needed and when it is not needed, and a conflict resolution process.

Here is an example of a decision making process.

1. Change request process: KM leaders can submit requests using a form on the team space.
2. Process for setting priorities: The core team meets once a month and ranks all current and proposed projects.
3. Voting process: Voting is done using a poll on the team space.
4. When consensus is needed, and when it is not needed: Major changes to the user interface require consensus of the core team. Minor changes do not.
5. Conflict resolution process: The organization KM leader resolves all conflicts in any of the virtual teams.

Decisions should be made with as much diversity of opinion, debate, and discussion as is reasonable. Whenever a consensus among the core team can be achieved, that is desirable. But when there is no consensus, after an appropriate amount of discussion, the organization's KM leader should make decisions so that progress is not stalled.

How the KM program is governed is critical to its success. Without strong leaders, representation from all constituent groups, regular calls and meetings, and effective processes for planning, reporting, and decision making, the implementation plan can't be properly executed, and thus the Top 3 Objectives won't be achieved. Pay close attention to getting this right, and it will pay off later.

Chapter 9: Specify Modes of Knowledge Flow

STEP 9: Specify the desired modes of knowledge flow.

The late Frank Leistner generously gave me a copy of his book, *Mastering Organizational Knowledge Flow: How to Make Knowledge Sharing Work*. In it, he wrote, "After a long time of playing with alternative terms, the one that actually fits best with my understanding is knowledge flow management, because the thing that you can manage is the flow of knowledge. When I started playing with the notion of knowledge flow, the analogy of knowledge flowing through the organization like a river flowing through its bed seemed to fit for a number of reasons. Flows find their own way, but they can also be guided and stopped by barriers. You can have some individuals steering the direction of the flow on a daily level and others providing the main bed of the river by setting strategic goals for the longer run."

Part of creating and executing a knowledge management program plan is implementing people, process, and technology components that will achieve the Top 3 Objectives. In order to do so, first think about which types of knowledge flow are needed.

There are five key ways in which the flow of knowledge can be tapped:

1. **Collection**: processes and repositories for capturing explicit knowledge. This involves attempting to codify and encapsulate knowledge in writing or some other form of stored data.
2. **Connection**: collaboration, communities, and social networks for sharing tacit knowledge. Connecting people allows them to exchange knowledge by communicating with one another.
3. **Boundary spanning:** bridges across organizational boundaries for enabling knowledge to flow between previously isolated groups. Building bridges to connect otherwise unconnected networks makes available previously unknown sources of knowledge.
4. **Discovery:** processes for learning from existing sources of information, including systems, databases, and libraries. Scouring established knowledge bases in order to gain insights, distill trends, and uncover useful nuggets can provide a competitive advantage.
5. **Creation:** processes for stimulating innovation and facilitating invention. By using the other modes of knowledge flow, creative ideas can be developed into useful new products, services, and ways of getting work done.

Putting knowledge to work in order to solve a problem, save time, make a sale, inspire innovation, improve quality, lower costs, increase profits, meet customer needs, and otherwise improve the world requires knowledge to flow between people.

In ***The Wealth of Knowledge: Intellectual Capital and the Twenty-first Century Organization***, Thomas Stewart makes the following important point:

> Connection, not collection: That's the essence of knowledge management. The purpose of projects, therefore, is to get knowledge moving, not to freeze it; to distribute it, not to shelve it.

Later in the book, Stewart describes "the Kraken," a Lotus Notes email list for general questions and answers:

> The founders imagined that people would spark discussion by uploading white papers and the like – that is, they expected that users would pile logs of content in the fireplace, generating fire in the form of questions, critiques, and the like. Instead, the spark comes first: 80 percent of Kraken traffic starts with questions: Does anybody know? Does anybody have? Has anybody ever done something like?
>
> The Kraken differs from KnowledgeCurve. The latter is supply-side; it's full of documents, artifacts, and other explicit knowledge… The Kraken's a conversation; KnowledgeCurve and its cousins are compendiums. KnowledgeCurve is about teaching; the Kraken is about learning.

In "Volunteer not conscript," Dave Snowden writes:

> If you ask someone, or a body for specific knowledge in the context of a real need it will never be refused. If you ask them to give you their knowledge on the basis that you may need it in the future, then you will never receive it.

Many KM programs emphasize capture too much – collecting lots of documents, but not being able to effectively reuse them. So which types of knowledge flow should you emphasize, and to what extent? Here is a look at each type and when to incorporate it.

1. Collection: processes and repositories for capturing explicit knowledge

Explicit knowledge is formal knowledge that can be conveyed from one person to another in systematic ways. Examples include books, documents, white papers, databases, policy manuals, email messages, spreadsheets, methodologies, multimedia, and other types of files.

Based on the points made by Tom Stewart and Dave Snowden, it is reasonable to question the value of devoting significant energy to document collection in advance of a need. But there is still value in capturing some information in easily retrievable repositories.

For example, before beginning a new project, it is useful to ask the question "has anyone ever done anything like this before?" If information on all prior projects has been collected in a searchable repository, then this question can be answered. Not all of the documents created by previous projects may have been captured, but if the names of the project team members are available, then it is possible to contact them to find out more and to request any relevant documents. This is an example of how collection and connection can work together to deliver important knowledge at the time of need.

Another example of how collection and connection complement one another is asking a community for help. In responding to a request from one community member, another member can point to a previously stored document that meets the needs of the first member.

One way of minimizing the need for collection is to use connection to identify a need and then respond with a document only upon such a request. Another way is to rely on discovery to ferret out information from existing databases such that additional collection is not required. For example, if information on previous projects is automatically captured as part of the organization's business management system, then it can be retrieved without the need for additional data entry.

Collection provides the supply side of knowledge. If you decide that it is needed, try to keep it to the absolute minimum needed to support the Top 3 Objectives. Rely on other modes of knowledge flow as much as possible. And be sensitive to Dave Snowden's point: "If you ask them to give you your knowledge on the basis that you may need it in the future, then you will never receive it."

2. Connection: collaboration, communities, and social networks for sharing tacit knowledge

Tacit knowledge is personal knowledge that resides in an individual. It is content that has not been recorded or exchanged. It relies on experiences, ideas, insights, values, and judgments and usually requires joint, shared activities in order to transmit it. Individuals possess tacit knowledge and must learn to verbalize that knowledge. The art of talking about a problem or opportunity causes it to take shape and to be defined. Once defined, it can be solved or developed.

Dave Snowden wrote "we will always tell more than we can write down." And according to Tom Stewart, "connection is the essence of knowledge management." So this mode of knowledge flow should be a key part of your KM plan.

Connection supports the demand side of knowledge. It enables demand-driven or just-in-time knowledge management.

Dave Snowden asserts: "If you ask someone, or a body for specific knowledge in the context of a real need it will never be refused." And Tom Stewart states: "80 percent of Kraken traffic starts with questions: Does anybody know? Does anybody have? Has anybody ever done something like?"

This argues for including communities, threaded discussions, and Enterprise Social Networks in your selected list of KM components (see Chapter 10). Communities are the people who connect, and threaded discussions and ESNs are the mechanism for the connection. These should almost always be part of any KM program.

3. Boundary spanning: bridges across organizational boundaries for enabling knowledge to flow between previously isolated groups

In "Building Smart Communities through Network Weaving," Valdis Krebs and June Holley define boundary spanners as "nodes that connect two or more clusters – they act as bridges between groups." They go on to observe: "When left unmanaged, networks follow two simple, yet powerful driving forces: 1. Birds of a feather flock together. 2. Those close by, form a tie. This results in many small and dense clusters with little or no diversity. Everyone in the cluster knows what everyone else knows and no one knows what is going on in other clusters. The lack of outside information, and dense cohesion within the network, removes all possibility for new ideas and innovations."

To overcome this tendency, it is important to make explicit efforts to establish links between different groups. Examples include different regions of the world (e.g., North America, Latin America, Europe/Middle East/Africa, and Asia Pacific), functions (e.g., engineering, manufacturing, marketing, sales, logistics, and service), business units (e.g., paper products, cleaning products, and health products), roles (e.g., interns, retirees, and contractors), and organizations (e.g., employees, customers, and partners).

An example of how boundary spanning can help overcome organizational barriers is product development and introduction. Marketing tells Engineering to develop a new product to meet a customer need. Engineering designs the product, which is produced by Manufacturing. Marketing promotes the product, which is sold to customers by Sales and delivered by Logistics. Service installs the product, and it repairs it if the customer has a problem with it. A community focused on a specific product that includes members from all of these functions can help them collaborate across boundaries.

One of the following collaboration conditions typically exists in an organization. These are listed in increasing level of connectedness:

1. There are no communities. Small work teams collaborate, but there is limited collaboration beyond the teams.
2. There are some communities within functions. For example, a community of engineers who help each other

out with designs.

3. There are some communities that span some functions. For example, a community for engineers and service people for a specific product.
4. There are some communities that span all functions. For example, a community with everyone involved in some way on a specific product.
5. There are communities for all offerings that span all functions and include customers and partners. This is true boundary spanning.

In the implementation plan, identify all groups that need to connect, and include boundary spanning as a required knowledge flow. The higher the level of connectedness you can achieve, the more knowledge will flow between groups. You can use Social Network Analysis to help determine the current state of social networks and to identify boundary spanning opportunities.

4. Discovery: processes for learning from existing sources of information, including systems, databases, and libraries

In most organizations there are information systems, transaction processing applications, and databases that are used to run the business. There is data captured in these systems that can be used to distill trends, answer queries, and support decision making. And this can be done without the need to capture data redundantly. For example, if customer purchase information is entered into the order processing system, it can be fed to a data warehouse for use by all departments.

Many organizations have libraries of information obtained through outside sources. These may include competitive intelligence, analyst reports, industry news, and benchmark data. Providing access to this information supports analysis, strategy formulation, and planning. If such libraries do not exist centrally, you should consider providing them to prevent individual departments from purchasing information on their own. If they do exist, then your plan should incorporate them into the resources provided through the user interface.

Many of the 100 Knowledge Management Specialties (see Chapter 23) can be used to support discovery, including:

- Analytics, text analytics, visualization
- After Action Review, sensemaking, ritual dissent
- Appreciative Inquiry, Positive Deviance, Most Significant Change
- Big data, databases, repositories, business intelligence, data warehouses, data lakes
- Competitive intelligence, customer intelligence, market intelligence, research
- Cognitive computing, artificial intelligence, natural language processing, machine learning, neural networks

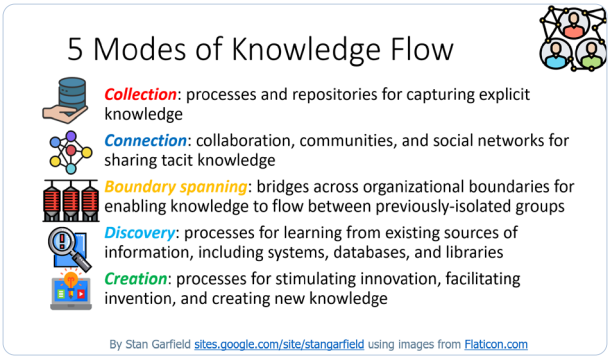
5. Creation: processes for stimulating innovation and facilitating invention

Creating new knowledge is an important goal for most organizations, but it is difficult to enable. By using the other modes of knowledge flow – collection, connection, boundary spanning, and discovery – and adding explicit processes to use these flows to create knowledge, innovation can be stimulated.

Let's look at an example. In a consulting firm, information about customer projects is captured in a repository (*collection*). Communities for each type of consulting service are active (*connection*), and include consultants, partners, contractors, and salespeople from all regions of the world (*boundary spanning*). Details on the win rate, delivery time, and profitability of each service offering are available in a data warehouse (*discovery*). Competitive and industry trends are available in a corporate library (*discovery*).

The leadership team has been asked to increase the gross profit margin of the consulting business. They take the following steps:

1. Search the project repository to see which customers are doing the most repeat business. Survey those customers about their upcoming needs.
2. Ask the communities for each service offering to offer their suggestions for improving profits. Select the best ones for implementation.
3. Analyze the information in the data warehouse to see which service offerings are the most and least profitable. Improve on the profitable ones and develop new offerings with similar attributes. Discontinue the unprofitable ones and deny approval to future proposals for offerings with similar attributes.
4. Review competitive and industry trends to see which competitors' offerings are the most profitable and what the analysts predict will be profitable. Use these findings to help shape new development efforts.
5. Combining all of these inputs, the leaders decide to drop their three worst-performing service offerings, invest in further developing their top three, and decide to create two new offerings based on customer input, community feedback, and analyst predictions.



By institutionalizing the process used in this case, a knowledge creation process can be reused for future innovation. It is not simple or intuitive to create new knowledge, but it is worth perfecting because the potential benefits are significant.

Examples of Knowledge Flow

Demand-driven knowledge sharing, which can also be called just-in-time knowledge management, emphasizes connection instead of collection. It assumes that knowledge will be provided at the time of need.

Here is how it works. Someone has a question, problem, or need to know who, what, when, where, why, and/or how about a topic. They search existing repositories and threaded discussion archives to see if there is an existing answer. If so, they use it. If no answer is found, they post their question, problem, or need to one or more relevant threaded discussions. Other members of the threaded discussion respond with their answers. The answers may include links to content in other repositories. The answers are automatically archived so that future searches will produce useful results.

Tacit knowledge can be shared through connection, and it can be turned into explicit knowledge through collection. Communities and social networks are the usual mechanisms for sharing tacit knowledge.

Here is an example. Someone wants to share an insight, a nugget of knowledge, or a solution to a problem that others may face. They post to a relevant threaded discussion. They may choose to write up their knowledge more formally, thus turning it into explicit knowledge.

Explicit knowledge is captured through collection and shared through connection. Repositories are typically used to capture this form of knowledge.

For example, someone wants to share reusable content such as a document, presentation, recording, process, procedure, template, tool, software source code module, or some other form of data. They upload the file containing the content to the appropriate repository. They post to the related threaded discussion to let the members know about the file, including a link to it.

By considering all five modes of knowledge flow, and incorporating them appropriately into your plans, you can decide how to enable and support all needed flows. This will be incorporated in the corresponding people, process, and technology components that you design as part of the program. And encouraging demand-driven knowledge sharing can help knowledge flow in very practical ways.

Chapter 10: Select and Implement KM Components

STEP 10: Select and implement people, process, and technology components using information architecture, design thinking, usability, user experience, and agile development. Develop detailed implementation plans for organization, training, documentation, communications, change management, and infrastructure.

Knowledge management helps people share, innovate, reuse, collaborate, and learn through people, process, and technology components. It is important to maintain a balance between people, process, and technology as you implement a KM program.

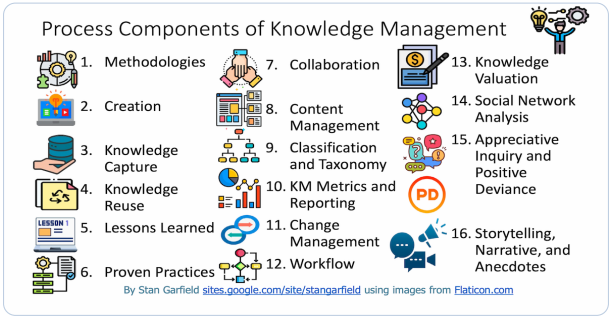
From the 50 KM Components listed below, select the ones that you will use as part of your KM strategy. Guided by your KM vision, the use cases you have developed, and the results of your user surveys, select the ones that will enable you to deliver the desired results.

50 KM Components

1. **Culture and values:** the way things are done in an organization, and what things are considered to be important and taboo
2. **Knowledge managers:** people who spend all or a significant portion of their time leading KM initiatives, sharing knowledge, and supporting others in sharing their knowledge
3. **User surveys and employee satisfaction surveys:** periodic surveys to determine user preferences, needs, and challenges and to determine how employees view a KM program and its components
4. **Social networks:** collections of people who are acquainted or connected as friends, business contacts, or colleagues and communicate, collaborate, or help one another as needed
5. **Communities:** groups of people who share a concern, a set of problems, or a passion about a topic, and deepen their understanding and knowledge of this area by interacting on an ongoing basis
6. **Training:** classroom courses, self-paced courses, and recorded webinars that allow users to learn what is expected of them; the people, processes, and tools that are available to them; and how to use all of these in order to share, innovate, reuse, collaborate, and learn
7. **Documentation:** user guides, manuals, and help files that allow users to read about what is expected of them; the people, processes, and tools available to them; and how to use all of these in order to share, innovate, reuse, collaborate, and learn
8. **Communications:** vehicles for informing current and potential users about progress in the KM initiative through websites, team spaces, portals, wikis, threaded discussions, calls, blogs, newsletters, distribution lists, and links
9. **User assistance and knowledge help desk:** people who provide support to users, including tool consulting, finding reusable content, connecting to knowledge sources, process support, training, communication, and other assistance
10. **Goals and measurements:** employee goals included in performance plans, and measurements to track performance against those goals and other operational indicators
11. **Incentives and rewards:** programs designed to encourage compliance with goals, improve performance against metrics, and increase participation in KM initiatives – includeing tangible rewards, recognition, and competitive rankings

12. **Methodologies:** policies, rules, techniques, and procedures that prescribe how work is to be performed and provide proven ways to do it successfully
13. **Creation:** inventing new concepts, approaches, methods, techniques, products, services, and ideas that can be used for the benefit of people and organizations
14. **Capture:** collecting documents, presentations, spreadsheets, records, processes, software source, images, audio, video, and other files that can be used for innovation, reuse, and learning
15. **Reuse:** putting to practical use the captured knowledge, community suggestions, and collaborative assistance provided through knowledge sharing
16. **Lessons learned:** explaining what an individual or team has learned as a result of their experience, using documents, presentations, discussions, and recordings – including what they tried, what worked, what didn't work, what to do, what to avoid, problems faced, how problems were solved, what they would do differently, and key insights and nuggets
17. **Proven practices:** selecting, documenting, and replicating processes that have proven to improve business results so that others in similar environments or with similar needs can benefit from the proven successes

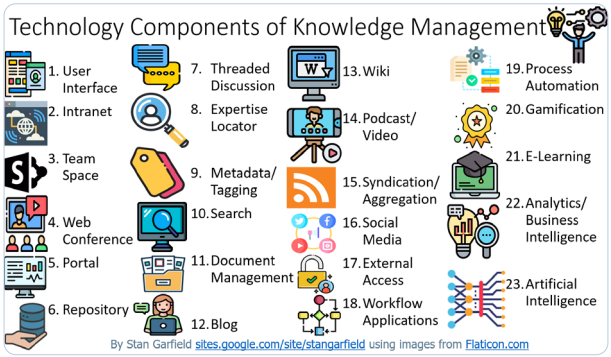
18. **Collaboration:** interacting with peers and colleagues to exchange ideas, share experiences, work together on projects, and solve problems
19. **Content management:** creating, managing, distributing, publishing, and retrieving structured information – the complete lifecycle of content as it moves through an organization
20. **Classification:** creating and maintaining a taxonomy that can be used to organize information so that it can be readily found through navigation, search, and links between related content
21. **Metrics and reporting:** capturing operational indicators and producing reports to communicate performance against goals, areas for improvement, and progress toward the desired state
22. **Change management:** developing a planned approach to change in an organization to address anticipated obstacles and to ensure successful adoption
23. **Workflow:** embedding knowledge creation, capture, and reuse in business processes so that these steps happen routinely as part of normal work
24. **Valuation:** quantifying the value of knowledge assets, reuse, and innovation so they can be fully appreciated by the organization, including customer pricing, cost benefit analysis, and project justification
25. **Social Network Analysis (SNA):** mapping and measuring of relationships and flows between people, groups, organizations, animals, computers or other information/knowledge processing entities; the nodes in the network are the people and groups while the links show relationships or flows between the nodes – provides both a visual and a mathematical analysis of human relationships
26. Appreciative Inquiry and Positive Deviance
    - **Appreciative Inquiry:** asking questions that strengthen a system's capacity to apprehend, anticipate, and heighten positive potential – mobilization of inquiry through the crafting of the "unconditional positive question"
    - **Positive Deviance:** an approach to change based on the observation that in any community, there are people whose uncommon but successful behaviors or strategies enable them to find better solutions to a problem than their peers, despite facing similar challenges and having no extra resources or knowledge
27. **Storytelling:** using narrative to ignite action, implement new ideas, communicate who you are, build your brand, instill organizational values, foster collaboration to get things done, share knowledge, neutralize gossip and rumor, and lead people into the future



28. **User interface:** the point of entry to a knowledge base that provides navigation, search, communication, help, news, site index, site map, and links to all tools
29. **Intranet:** a private computer network that uses Internet protocols, network connectivity, and possibly the public telecommunication system to securely share part of an organization's information or operations with its employees
30. **Team spaces:** collaborative workspaces designed to allow teams to share documents, libraries, schedules, and files; conduct meetings, calls, surveys, and polls; and store meeting minutes, discussions, reports, and plans
31. Virtual Meeting Rooms, Web/Video/Audio Conferencing, and Telepresence
    - **Virtual meeting rooms and web conferencing:** online, real-time tools designed to allow teams to share presentations, applications, and white boards during meetings
    - **Videoconferencing:** Technology that allows two or more locations to communicate by simultaneous two-way video and audio transmissions
    - **Telepresence:** Technology that allows a person to feel as if they were present, to give the appearance of being present, at a place other than their true location
32. **Portals:** websites that provide personalized capabilities to users through the use of customization, building blocks, and integration of multiple sources
33. **Repositories:** structured lists and databases that allow documents and other files to be stored, searched for, and retrieved
34. **Threaded discussions and Enterprise Social Networks:** forums for carrying on discussions among subscribers on a specific subject, including online and email posts and replies, searchable archives, and discussions grouped by threads to show the complete history on each topic
35. **Expertise locators and Ask the Expert:** systems for finding experts on particular subjects, allowing individuals to enter details about what they know and can do, and others to search for all people having desired skills, experience, or knowledge; and systems for asking questions of experts and getting the answers
36. **Metadata and tags:** information about information – data fields added to documents, websites, files, or lists that allow related items to be listed, searched for, navigated to, syndicated, and collected
37. **Search engines:** tools that allow searching for documents,

files, list items, content, and answers to questions – allow specifying the scope or domain of the search, whether to search on text or metadata, and how results should be presented

38. **Archiving:** offline file storage for legal, audit, or historical purposes, using tapes, CDs, or other long-term media
39. **Blogs:** websites where posts are made (similar to a journal or diary), displayed in a reverse chronological order; often provide commentary or news on a particular subject; some function as personal online diaries or logbooks; combine text, images, and links to other blogs and websites; typically provide archives in calendar form, local search, syndication feeds, reader comment posting, trackback links from other blogs, blogroll links to other recommended blogs, and categories of entries tagged for retrieval by topic
40. **Wikis:** websites that allow users to easily add, remove, edit, and change most available content – effective for collaborative writing and self-service website creation and maintenance. They are effective for collaborative writing, self-service page creation, and shared maintenance of information. A wiki page can be edited by anyone, thus making it easy to collaborate on writing a document, creating a website, or collecting information on a topic.
41. **Podcasts and videos:** recordings that can be listened to or viewed online, or downloaded manually or automatically through syndication and then listened to or viewed on mobile devices whenever is convenient
42. Syndication, Aggregation, and Subscription Management Systems
    - **Syndication and aggregation**: using feeds available from a website or other content source to provide an updated list of its content in the form of a subscription, an embedded portion of a website, or a collection of disparate content on a particular topic
    - **Subscription management systems**: tools that allow content providers to reach subscribers on an opt-in basis, and subscribers to sign up to receive periodicals and other communications based on their interests
43. **Social software and social media:** a range of tools that facilitate social networking, typically personal web pages including bios, interests, links, photos, videos, personal networks, posts, and comments; web and mobile technologies used to turn communication into interactive dialogue, photo sharing, and video sharing
44. **External access:** capability for users outside of a company's firewall to have access to selected websites and team spaces to allow collaboration with retirees, partners, and customers who would otherwise be blocked from the company's internal network – requires technical, security, and legal elements
45. **Workflow applications:** software that connects and sequences different applications, components, and people, all of which must be involved in the processing of data to complete an instance of a process
46. **Process automation:** tools that automate previously manual processes, such as producing proposals, creating presentations, developing products, managing surveys, or managing reporting
47. **Gamification applications:** tools that use game mechanics to motivate desired knowledge management behaviors, such as awarding and tracking points for sharing and reusing knowledge
48. **e-Learning:** tools that enable the delivery and tracking of online training courses
49. Analytics and Business Intelligence
    - **Analytics:** discovery and communication of meaningful patterns in data and text
    - **Business Intelligence:** the ability for an organization to take all its capabilities and convert them into knowledge; includes data mining, data visualization, big data, databases, data warehouses, and data lakes
50. **Artificial Intelligence:** the capacity of a computer to perform operations analogous to learning and decision making in humans, as by an expert system; includes natural language processing, machine learning, and neural networks



Specialties to Use in Implementation

There are fields of practice that can be very useful in the process of implementing knowledge management components. The following five specialties are important to use, either by hiring people with skills and experience or by engaging outside consultants with this expertise.

1. Information Architecture

Information Architecture (IA) is organizing, structuring, and labeling content in an effective and sustainable way to help users find information and complete tasks. Rather than install individual applications and then attempt to integrate them, have an information architect review the environment and help design a cohesive architecture that takes into account the current state and maps a path to the desired future state.

This following is from Peter Morville (lucidea.com/blog/km-thought-leaders-peter-morville/):

Information Architecture is:

1. The structural design of shared information environments
2. The synthesis of organization, labeling, search, and navigation systems within digital, physical, and cross-channel ecosystems

3. The art and science of shaping information products and experiences to support usability, findability, and understanding
4. An emerging discipline and community of practice focused on bringing principles of design and architecture to the digital landscape

There are three types of information architecture:

1. Strategic IA (maps, places, experiences, understanding, governance, culture)
2. Tangible IA (structure, organization, navigation, labeling, search)
3. Deep IA (taxonomy, thesauri, metadata, language, vocabulary, standards)

IA helps users understand where they are, what they've found, what's around, and what to expect. The role of an information architect is to:

- Clarify the mission and vision for the system, balancing the needs of its sponsoring organization and the needs of its audiences.
- Determine what content and functionality it will contain.
- Specify how users will find information by defining organization, navigation, labeling, and searching systems.
- Map out how the system will accommodate change and growth over time.

An information architect must learn about business goals and context, content and services, and user needs and behavior; and then work with colleagues to transform this balanced understanding of the information ecology into the design of organization, labeling, and navigation systems that provide a solid but flexible foundation for the user experience.

2. Design Thinking

Design Thinking is a human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success. When implementing a knowledge management system, using design thinking will help ensure it will meet the needs of the target users.

The following is from Sarah Gibbons of NNG (nngroup.com/articles/design-thinking/):

Design thinking is an ideology supported by an accompanying process. A complete definition requires an understanding of both.

Definition: The **design thinking ideology** asserts that a hands-on, user-centric approach to problem solving can lead to innovation, and innovation can lead to differentiation and a competitive advantage. This hands-on, user-centric approach is defined by the **design thinking process** and comprises 6 distinct phases

1. **Empathize**: Conduct research in order to **develop knowledge about what your users do, say, think, and feel.**
2. **Define**: Combine all your research and **observe where your users' problems exist.**
3. **Ideate**: **Brainstorm a range of crazy, creative ideas** that address the unmet user needs identified in the define phase.
4. **Prototype**: Build real, tactile representations for a subset of your ideas. The goal of this phase is to **understand what components of your ideas work,** and which do not.
5. **Test**: Return to your users for feedback. Ask yourself 'Does this solution meet users' needs?' and 'Has it improved how they feel, think, or do their tasks?' **Put your prototype in front of real customers** and verify that it achieves your goals.
6. Implement: Put the vision into effect. Ensure that your solution is materialized and touches the lives of your end users. **This is the most important part of design thinking.**

3. Usability

Usability is making products and systems easier to use and matching them more closely to user needs and requirements. A knowledge management environment that is highly usable will keep users coming back, unlike hard-to-use systems.

The following is from Jakob Nielsen (nngroup.com/articles/usability-101-introduction-to-usability/):

Usability is defined by **5 quality components**:

1. **Learnability**: How easy is it for users to accomplish basic tasks the first time they encounter the design?
2. **Efficiency**: Once users have learned the design, how quickly can they perform tasks?
3. **Memorability**: When users return to the design after a period of not using it, how easily can they reestablish proficiency?
4. **Errors**: How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
5. **Satisfaction**: How pleasant is it to use the design?

4. User Experience

User Experience (UX) is a person's perceptions and responses that result from the use or anticipated use of a product, system or service. Applying UX concepts increases the likelihood that users will embrace KM processes and tools that are implemented.

All KM applications and systems should empower users in the following ways:

1. Be easy and intuitive to use. This cuts down on user frustration, wasted time, and calls for help.
2. Offer flexibility in access and use, e.g., online, email, mobile app. Optimize the user experience for each channel

to minimize complaints.
3. Allow simple and complete integration with other applications, e.g., enterprise search, email, HR systems, etc. This makes it convenient for users and requires less training.
4. Provide rich functionality that is clearly better than other alternatives and helps people to much more readily do their work. This saves time and improves job satisfaction.
5. Deliver a consistent user interface and dependable functionality. This makes life easier for the users.

The elements of KM systems that offer a great user experience include:

6. Designed for usability
7. Responsive performance
8. Predictable availability and reliability
9. Easy to learn and use
10. Deliver expected results

The following is from Kate Caplan of NNG (nngroup.com/articles/what-is-user-experience/):

> User Experience (UX) is the holistic relationship – encompassing perceptions, emotions, and interactions – between a person and a product, service, or company. UX encompasses all aspects of the end-user's interaction with the company, its services, and its products – not just how a page on a website or a screen within an application looks and behaves.

Use these quality attributes to measure and improve facets that impact user experience.

1. **Accessibility:** Does the design consider and enable people of all abilities?
2. **Usability:** Can people effectively accomplish what they need to do with the design?
3. **Credibility:** Do people perceive the design as trustworthy or untrustworthy?
4. **Satisfaction:** How enjoyable and efficient to use is the design?
5. **Usefulness:** How valuable is the design? Does it solve a problem for users?

5. Agile Development

Agile development is a way to manage a project by breaking it up into several phases. It involves constant collaboration with stakeholders and continuous improvement at every stage. Once the work begins, teams cycle through a process of planning, executing, and evaluating. Continuous collaboration is vital, both with team members and project stakeholders. Agile development can be applied more broadly as agile management, which involves small teams and short cycles, is customer-driven, and is driven through a network, not a hierarchy. Taking an agile approach to KM implementation will likely speed up adoption.

Principles Behind the Agile Manifesto (agilemanifesto.org/principles.html)

> "Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
>
> Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
>
> Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
>
> Businesspeople and developers must work together daily throughout the project.
>
> Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.
>
> The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
>
> Working software is the primary measure of progress.
>
> Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
>
> Continuous attention to technical excellence and good design enhances agility.
>
> Simplicity--the art of maximizing the amount of work not done--is essential.
>
> The best architectures, requirements, and designs emerge from self-organizing teams.
>
> At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly."

Implementation Plans

To help implement the selected people, process, and technology components, develop detailed plans for the following six categories. These can either be six separate plans or six sections of an overall plan. Once developed, don't let the plans sit idle. Take steps to ensure that the plans are followed. If changes are needed along the way, update the plans accordingly.

1. Organization

This plan should include the org structure, reporting lines, composition of program staff (solid-line direct reports) and extended virtual team (dotted-line indirect reports), roles and responsibilities, and alignment with internal groups and external partners. Following the organizational design principles outlined below will help deliver a viable plan.

The following is from the Academy to Innovate HR (aihr.com/blog/organizational-design):

Any sound organizational design initiative needs to deliver the following:

1. **A clear strategic intent:** What are we aiming to deliver?
2. **Guiding principles:** What are the principles that inform our design decisions?
3. **Capability maps:** Which capabilities do we need to deliver on the strategic intent, and how do they differ in strategic importance?
4. **Operating model blueprint:** How will these capabilities work together to execute?
5. **Work design:** What are the teams, jobs, and skills required to deliver, and how do we organize them?
6. **Workforce plan:** What are our strategies to resource the structure?
7. **Performance measures:** How will we know that the design is working?

Five organizational design principles

1. **Specialization principle**: boundaries should exist to encourage the development of specialist skills.
2. **Coordination principle**: activities that are done should be coordinated in a single unit.
3. **Knowledge and competence principle**: responsibilities should be allocated to the person or team best fit to do them.
4. **Control and commitment principle**: having effective control on the one hand while maintaining engagement and commitment on the other hand.
5. **Innovation and adaptation principle**: organizational structures should be sufficiently flexible to adapt to an ever-changing world.

There are five factors that greatly impact organizational design. These factors are:

1. **Strategy**. Strategy dictates the strategic priorities of an organization. This is the most important influencing factor of organizational structure and design.
2. **Environment**. The environment a company operates in influences its strategy but also dictates how it positions itself. In a rapidly changing environment, the organization has to design for more flexibility, or adaptability, while in a stable environment, the organization can optimize for efficiency.
3. **Technology**. Information technology is a key enabler for decision-making. The state of IT impacts organizational design as well. When systems are in place, and decision-making is based on data, the organizational structure and design – including the potential for hierarchical control – will be different from an organization where most of the data is stored in unorganized Excel sheets.
4. **Size and lifecycle**. The organizational size and lifecycle also impact the organizational structure and design. A 20-person company has very different challenges when it comes to design compared to a 200,000-person company.
5. **Culture**. Organizational culture is another key element that impacts organizational structure and design – and, vice versa, design also impacts culture.

2. Training

Training is required when introducing a new KM initiative, as it is rolled out across your organization, and as a key part of ongoing implementation. You can never succeed in successfully educating everyone in your target audience, so you have to continue to offer training in a variety of ways.

Classroom courses, self-paced courses, and recorded webinars allow users to learn what is expected of them; the people, processes, and tools available to them; and how to use all of these in order to share, innovate, reuse, collaborate, and learn.

Develop a training plan that includes the following vehicles.

Classroom courses are the best way of getting the undivided attention of those to be trained, but it is often difficult to get funds allocated for expenses and student time freed up for attendance. Webinars and self-paced courses may offer the most realistic method of delivering training.

Webinars are virtual training courses conducted using some combination of the following elements.

- Web conferencing: Participants log in to a virtual meeting where they can view presentations, demonstrations, and interactive white boards and chat with other participants.
- Multimedia: webcasts that broadcast video, audio, and slides and allow questions to be typed into a web form.
- Team space: Collaborative workspace where presentations can be accessed before, during, and after a webinar.
- Real-time navigation to web pages: Participants visit web pages as instructed on a call to view systems and applications.
- Recording: A live event can be recorded and replayed later at the convenience of the participants. Audio is recorded and the participant listens (by phone or by audio file) and follows along by visiting the team space or specified web pages. Alternatively, the virtual meeting room presentation or webcast is recorded as a multimedia file.

Self-paced courses are automated, interactive presentations incorporating the following elements.

- Web pages: Students read web pages and follow along sequentially.
- Multimedia: Flash web pages, audio, and video are used to present content dynamically.
- Interactive questions: Students are asked questions as they take the course and receive immediate feedback.
- Dynamic branching: Students can choose paths based on their interests or their answers to questions.
- Bookmarks: Students can start and stop at any time, and when they return, they can resume from where they left off.
- Delivery method: How the course is presented to the student. Options include:
    1. web-based – delivered entirely through a web browser, either on the intranet or Internet
    2. client-based – delivered as a downloaded application run on the PC client
    3. portable media-based – delivered as a CD, DVD, or flash memory plug-in

The training plan should include the following elements for each course:

1. Content: what subjects will be covered
- introduction: a high-level overview of the KM initiative and its components
- survey: a more thorough overview including details on the most important components
- in-depth topic (e.g., one of the 50 KM Components, a particular process or tool, or a method or technique)

2. Delivery Method: how the course will be presented
- classroom courses
- webinars
    1. live
    2. recorded
- self-paced courses

3. Schedule: when will the course be presented
- one-time date(s)
- recurring dates
- available on demand

4. Duration: how long will the course last
- classroom and webinar: actual time
- self-paced: expected time

5. Audience: to whom is the course directed
- KM team: for KM leads, project leads, and knowledge assistants
- users: for users who are not members of the KM team
- managers: targeted at managers

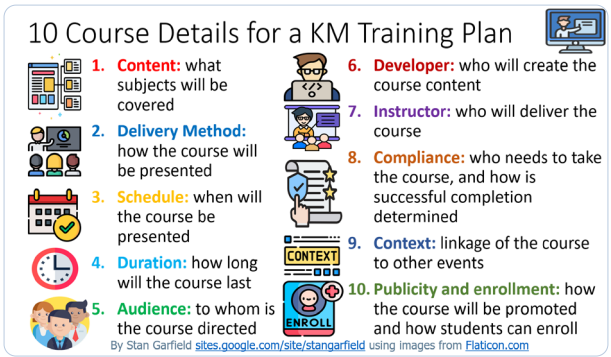
6. Developer: who will create the course content
- in-house training: the learning & development function of your organization
- in-house KM team: KM lead, project lead, or knowledge assistant
- training firm: external company specializing in course development
- consultant: external KM expert
- commercially available: off-the-shelf courses available for purchase

7. Instructor: who will deliver the course
- in-house training: the learning & development function of your organization
- in-house KM team: KM lead, project lead, or knowledge assistant
- training firm: external company specializing in course delivery
- consultant: external KM expert
- commercially available: off-the-shelf courses available for purchase

8. Compliance: who needs to take the course, and how is successful completion determined
- voluntary: no requirement to attend
- mandatory: participation is required and checked, but no test results are collected
- mastery: successful completion is tested for, and the course must be repeated until the participant passes

9. Context: linkage of the course to other events
- standalone: not part of any other event
- new hire: part of standard on-boarding indoctrination
- specialty events: part of other training or conferences
- kickoff meetings: part of initial or annual full-organization events
- staff meetings: part of regular meetings

10. Publicity and enrollment: how the course will be promoted and how students can enroll in it
- course catalogs: document which list available training
- websites: sites which list available training and link to enrollment system
- internal blogs, newsletters, and podcasts: communications vehicles for promoting the availability, schedule, and websites for training
- email messages: targeted messages announcing training, providing the details of what is expected and required, and reminding about schedules
- training logistics system: tool used to enroll students, record classes taken, and report on compliance



3. Documentation

Complete and effective documentation supports training, communications, and user assistance. It is a good way to demonstrate knowledge sharing and reuse. Documentation allows users to learn about all elements of a KM program, including what is expected of them; the people, processes, and tools available to them; and how to use all of these in order to share, innovate, reuse, collaborate, and learn

The types of documentation to provide include big picture documents, user's guides, administrator's guides, policies and procedures, and knowledge sharing documents.

1. Big Picture Documents: These are conceptual or overview documents. They help users understand the importance of knowledge management and their role in making it succeed. For those interested in a high-level view of knowledge management, why things work the way they do, and what resources are available.

Examples:

1. **Strategy and Vision:** defines the Top 3 Objectives, the KM Strategy, and a vision for how things should work
2. **Program Governance:** describes how the KM program is governed
3. **Roles:** defines the roles of KM leaders, project leaders, and knowledge assistants
4. **Priorities:** defines the KM team's priorities for the year
5. **Expectations:** states the importance of KM to the organization and specifies the responsibilities of all professionals and managers
6. **Getting Started:** explains basic KM concepts, what resources are available, and how to learn more
7. **Initiatives Inventory:** lists all KM initiatives in the organization with sponsoring organizations, responsible individuals, and links to websites
8. **Overview:** provides highlights of the KM program, details on all components, and screen shots of and links to all relevant websites
9. **Architecture:** explains the structure of the KM environment, the standard taxonomy, how content is contributed, and how it is searched for
10. **Insights:** provides an overview of the topic of Knowledge Management, including definitions, models, process maps, checklists, and industry examples

hese are written to help users understand how to do something. Knowledge assistants can refer users to these when providing support.

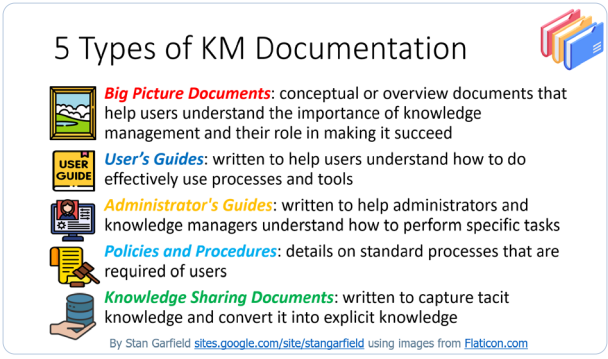
Examples:

1. **FAQ (Frequently Asked Questions):** answers to the most typical questions about finding content, sharing, asking questions, tools, external access, communities, collaboration, archiving, expectations, time reporting, contacts, documentation, rewards, training, and support
2. **How to Collaborate:** describes the processes and technologies that are used to encourage employees to collaborate and participate in communities
3. **Communities:** explains how to create, build, sustain, and participate in communities
4. **Face-to-face Knowledge Sharing:** describes why this is important, different types, guidelines, examples, suggestions, and pitfalls to avoid
5. **People Guides:** explains how to use a particular KM people component, e.g., knowledge help desk, measurements, or incentives
6. **Process Guides:** explains how to use a particular KM process, e.g., capture, reuse, or lessons learned
7. **Tools Guides:** explains how to use a particular KM tool, e.g., team space, repository, or threaded discussion
8. **How to Ask for Help:** describes the key elements of a successful request for help for those posting a question to a threaded discussion or sending an email message seeking help to a large distribution list
9. **How to Record Time:** explains how time spent on KM activities should be reported in the organization's labor tracking system
10. **How to Track Accomplishments:** describes how to track KM accomplishments in order to take credit for them during performance reviews

3. Administrator's Guides: These are written to help administrators and knowledge managers understand how to do something.

Examples:

1. **Team Space Administrator's Guide:** helps team space administrators manage team spaces effectively
2. **Portal Administrator's Guide:** addresses the most common issues faced by portal administrators
3. **Threaded Discussion Moderator's Guide:** describes the role and duties of moderators
4. **Threaded Discussion Administrator's Guide:** details every aspect of the software used for threaded discussions
5. **Metadata Guide:** defines the standard metadata used for documents stored in repositories



4. Policies and Procedures: Details on standard processes required of users. These may be part of an official document repository, in which case, they are linked to from the KM documentation web page.

Examples:

1. **Collaboration Policy:** defines the policy for how teams are to collaborate
2. **Knowledge Capture and Reuse Policy:** defines the policy for how knowledge is to be captured and reused
3. **Knowledge Capture and Reuse Procedure:** details the steps to follow in support of the policy
4. **Records Management Policy:** defines the policy for how the organization's business records are to be managed
5. **Archiving Procedure:** details the steps to follow in support of the records management policy's archiving rules

5. Knowledge Sharing Documents: These are written to capture tacit knowledge and convert it into explicit knowledge.

Examples:

1. **White Papers:** brief publications about trends, insights, and knowledge nuggets
2. **Methodologies and techniques:** brief publications sharing tips, tricks, and how-to advice
3. **Case Studies:** in-depth reviews of actual practices
4. **Seminars and Conferences:** materials received at or presented at industry events, training courses, or symposia
5. **Customer-Ready Materials:** presentations designed for external audiences

4. Communications

Timely communications are critical to successfully introducing a new KM initiative and to keeping the organization informed on implementation progress. Some information needs to be communicated repeatedly, since you won't reach everyone at any one time, and some people won't pay attention even if you do reach them. So create a communications plan with both new and recycled elements to introduce new developments and remind about existing ones.

In the plan, specify the vehicles you will use to inform your organization about the program, including plans, roll-out, and ongoing implementation. Focus on the deliverables of the KM strategy, not the strategy itself. Use communications vehicles to inform current and potential users about progress in the KM initiative.

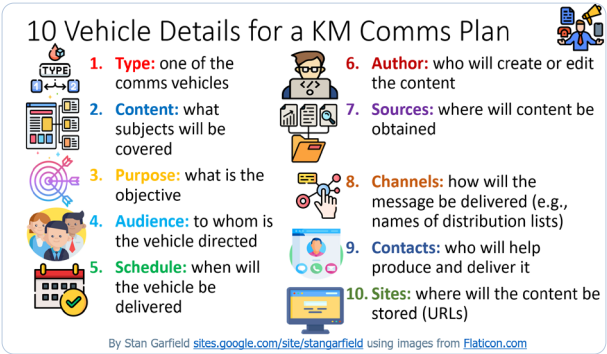
Provide details on your planned use of the following vehicles.

1. **Websites:** Intranet pages dedicated to the KM program. Use as the starting point for accessing all knowledge resources.
2. **Team spaces:** Collaboration sites dedicated to the core team, knowledge assistant team, group teams, and the KM community. Use to share files, hold meetings, conduct polls, and maintain lists.
3. **Portals:** Repositories of KM documents. Use to store big picture documents, user's guides, administrator's guides, and policies and procedures.
4. **Wikis:** Intranet pages which can be edited by any user. Use for interactive editing of content by multiple people.
5. **Threaded discussions:** Online discussion for the KM community. Use to disseminate information, ask and answer questions, and share insights.
6. **Calls:** Regular calls for the KM community. Use for two-way communications, status updates, and learning.
7. **Blogs:** Posts by members of the KM core team. Use to post regular updates, solicit comments, and take advantage of syndication capability.
8. **Newsletters:** Periodicals sent to subscribers interested in knowledge management and knowledge resources. Use to provide regular updates, success stories, and useful content to interested parties.
9. **Podcasts:** Recorded broadcasts available on demand or by subscription. Use for those who prefer audio, like to listen while performing other tasks, or who are not usually connected to the network and subscribe for automatic downloads of the broadcasts through syndication.
10. **Videos:** Recorded videos available on demand. Use for those who prefer video, when there is important visual content, or for special occasions.
11. **Distribution lists:** Lists of email addresses used to distribute messages about the KM program. Use for occasional communication of high importance and do so infrequently to reduce information overload.
12. **Reports:** Details on how the KM initiative is performing against its goals. Use for communicating program progress to leaders and stakeholders.
13. **Submissions:** Articles about the KM program submitted to other newsletters. Use to inform those who may currently be unaware of the existence of your program and point them to other available communications vehicles.
14. **Links:** Links to KM websites which appear on other websites. Use to attract visitors to the program website from other high-traffic websites.
15. **Meetings:** Face-to-face gatherings of members of the KM community. Use to build trust, establish direction, and solicit inputs.
16. **Internal presentations:** Attending meetings of other groups to deliver a KM message. Use to increase awareness, influence behavior, and request cooperation.
17. **External presentations:** Talking about the KM program to external audiences. Use to build credibility, demonstrate thought leadership, and receive feedback.
18. **External publications:** Publishing articles in magazines, journals, blogs,and websites. Use to increase visibility and build a positive reputation.
19. **External conferences:** Attending and presenting at industry events. Use to increase recognition, network with peers, and test ideas.
20. **Audience surveys:** Soliciting inputs from the target audience, since communication isn't just about talking – it also includes asking questions and listening. Use to determine what users like, dislike, and want changed.

The communications plan should include the following elements for each vehicle.

1. **Type:** one of the vehicles
2. **Content:** what subjects will be covered

3. **Purpose:** what is the objective
4. **Audience:** to whom is the vehicle directed
5. **Schedule:** when will the vehicle be delivered
6. **Author:** who will create or edit the content
7. **Sources:** where will content be obtained
8. **Channels:** how will the message be delivered (e.g., names of distribution lists)
9. **Contacts:** who will help produce and deliver it (names, phone numbers, and email addresses)
10. **Sites:** where will the content be stored (URLs) – Tip: use a URL that is easy to remember, such as km.name.com, for the KM home page



5. Change Management

Change management is developing a planned approach to change in an organization to address anticipated obstacles and to ensure successful adoption. According to Jean Claude Monney, the former CKO of Microsoft Services, "All KM initiatives are change initiatives." He recommends following the Prosci ADKAR Model: awareness, desire, knowledge, ability to change, and reinforcement of the change.

There are varying schools of thought about the value of change management. Some believe that it is an essential part of any KM initiative. Others dismiss it as an obsolete concept. Most KM initiatives will involve significant changes to the existing behaviors, processes, and systems, so it is useful to create a change management plan.

The value of change management is that it forces you to consciously deal with the changes that will be required to enable knowledge management to succeed. If you fail to do so, and proceed to implement new people, process, and technology components with inadequate preparation, conditioning of the organization, and communication, then the new components may not be adopted as expected.

Changing existing processes and tools, and introducing new ones, are the key change elements to plan for. Analyze the potential impact of these changes, and plan to explain to the users how they will benefit, what their roles will be in implementing the changes, and how you will help them through the changes.

Steps to Follow

1. Develop a KM Change Management plan and help implement it. It should be part of the KM Implementation Plan and the overall plan of record.
2. Ask communities of practice for advice and to help with change management. Listen to what the members have to say, and then follow through with their suggestions. Enlist their leaders and members to help communicate about upcoming changes.
3. There may be resources within your organization to assist you in developing and implementing a change management plan. If so, take advantage of these. If not, there are books and consultants who can help see the lists below). Engage these resources to ensure that you have a viable plan and have considered the implications of your KM initiative and how the organization will have to adapt in order to embrace it.
4. If the culture of the organization does not include sharing and collaboration, a significant change management initiative will be needed to start changing the culture. Help the culture and values of the organization evolve to support knowledge management. See Chapter 3 for details on assessing your organization's culture.
5. To enable knowledge-related actions, it is helpful to provide incentives and rewards to your targeted users to encourage the desired behaviors. When introducing a change initiative, some believe that rewards can yield short-term results, but that the effects wear off over time. I have seen them work very effectively. See Chapter 21 for details on motivating knowledge sharing.
6. For any change initiative, all stakeholders will want to know what's in it for them. To help them understand the benefits for them personally, and for the organization overall, answer the following questions:
    - Why should we implement a KM program? Articulate your vision.
    - What are the benefits? Select from the list of benefits and tie these to your organization.
    - How will it help our organization accomplish its key objectives? Tie the Top 3 Objectives to the organization's overall priorities.
    - How will our organization improve as a result? Make the business case.
    - How will our people's needs, opportunities, and challenges be met? Explain the compelling use cases.

Methods

Although there are many specialized change management methods and techniques, multiple components and approaches should be used in change management. Most of the people components can be applied to change management. Instilling a knowledge-sharing culture with positive values is enabled through the work of knowledge managers, employee surveys, social networks, communities, training, documentation, communications, user assistance, goals, and rewards.

Several process components are also useful:

1. **Most Significant Change** is the collection of significant change stories emanating from the field level, and the systematic selection of the most significant of these stories by panels of designated stakeholders or staff. Once changes have been captured, various people sit down together, read the stories aloud and have regular and often in-depth discussions about the value of these reported changes.
2. **Knowledge Café** and **World Café** are intentional ways to create a living network of conversation around questions that matter. It is a creative process for leading collaborative dialogue, sharing knowledge, and creating possibilities for action in groups of all sizes.
3. **Social Network Analysis** (SNA) was used by the leaders of one company when they wanted to break down geographic barriers and become a more global organization. They hoped to informally enlist influential employees to assist with change management, but first they had to identify which employees were most connected with others and who did the most to forge relationships across locations. SNA allowed them to do this.
4. **Appreciative Inquiry** can be applied in change management. According to Lynne Levesque, "Appreciative Inquiry is not only an incredibly useful tool for change management; it is also applicable as a good coaching practice. Leaders who use probing questions in an appreciative mode that generates collaborative learning will see long-lasting behavior changes."
5. **Storytelling** can be used to manage change. Almost all forms of narrative are useful in change management, including motivating others to action, building trust, transmitting values, getting others working together, taming the grapevine, and creating and sharing a vision.

6. Infrastructure

When implementing knowledge management components, it's important to consider the alternatives for software. Should you use existing systems, purchase new software, develop custom applications, or some combination of these? Is there a single platform that can meet all of your identified needs? How many different vendors do you need? What does your IT department recommend, what are they capable of developing and integrating, and what budget exists for buying and supporting software?

Six Cs

When evaluating KM software there are six Cs to consider.

1. Capture

To support knowledge capture, a KM tool should enable:

1. Contributing content to and retrieving it from knowledge repositories, knowledge bases, and structured lists. This should be easy to do via user-friendly interfaces.
2. Integrating content from multiple internal and external sources. This should be done seamlessly and transparently.
3. Populating and updating individual skills profiles to enable expertise location. This should include the capability to extract relevant information from HR databases, external sources, and knowledge sharing tools such as threaded discussions.

2. Curate

Knowledge curation is taking existing information and making it more useful, including better organizing it, making it more findable, and making it easier to use. To curate is to collect, select, assemble, and present information or multimedia content for other people to use. To support knowledge curation, a KM system should enable:

1. Creating and editing content collections and FAQs, providing consolidated views of content, and delivering customized content via portals. This is for knowledge managers.
2. Managing the full content lifecycle. This is for content managers.
3. Modifying threaded discussions by adding and editing tags and merging, splitting, renaming, and removing threads. This is for community managers.

3. Connect

Connection is the essence of knowledge management. There are three types of connection that are important. These are people-to-people, people-to-content, and content-to-content. To support all three types, KM software should enable:

1. People to People: Communities of Practice and Enterprise Social Networks.
2. People to Content: Enterprise Search and Federated Search.
3. Content to Content: Enterprise Taxonomy, standard metadata application, and integration with other internal and external systems.

In addition to these, the ability to connect software to other applications is important. Integration through APIs, RSS feeds, or other means should be available.

4. Collaborate

To support collaboration, a KM platform should enable:

1. Team Spaces for team collaboration.
2. Threaded Discussions for community collaboration.
3. Wikis for collaborative editing.

5. Create

Knowledge creation includes inventing and innovating new concepts, approaches, methods, techniques, products, services, and ideas that can be used for the benefit of people and organizations. To support knowledge creation, KM technology should enable:

1. Innovation Management: A vehicle for submitting, tracking, and processing suggestions and ideas, with the goal of acting on the best ones. This can be via specialized systems for collecting and managing ideas or using an Enterprise Social Network with special tagging.
2. Standard Methodologies: Repeatable techniques and approaches that can be used to solve a problem or accomplish a desired result in a proven way. A process for practitioners who discover improved ways of doing things to convert their insights into new methodologies.
3. Content Creation: A simple way to create and contribute white papers, presentations, podcasts, videos, and training modules. Gamification can be effective in motivating the creation of new content.

6. Communicate

Communicating is conveying information and news updates to other people. This can be done using writing, images, audio, or video. To support communication, KM applications should enable:

1. Discovery: Publishing top-down vetted information and providing browsable directories.
2. Syndication and Subscription: Providing content such that it can be subscribed to using an RSS (Really Simple Syndication) feed reader, integrated into a website as a subset of that site, or received as an email notification or application alert.
3. Blogs: Posting articles or entries (as in a journal) displayed in reverse chronological order. Blog posts combine text, images, and links to other blogs and websites. They typically provide archives in calendar form, local search, syndication feeds, reader comment posting, trackback links from other blogs, blogroll links to other recommended blogs, and categories of posts tagged for retrieval by topic.

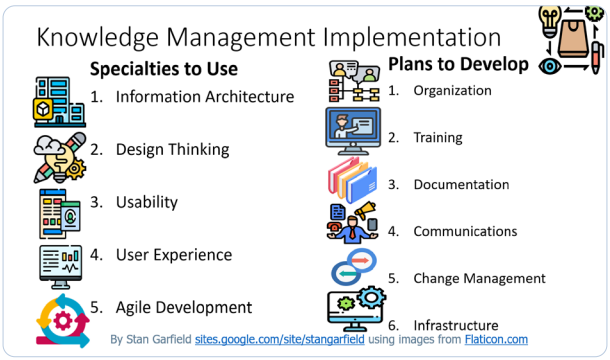
Infrastructure Platforms

Most vendors try to position their products as comprehensive, but they usually focus on a subset of all needed functionality. Integration with other products is typically offered as a way of extending their capabilities. Options for infrastructure platforms include:

SKICE

- **Suite:** An extensive, integrated set of office automation and collaboration tools (e.g., Google Workspace and Microsoft 365)
- ***Knowledge Base:*** platforms that enable contributing and finding knowledge (e.g., Bloomfire and Lucidea Presto)
- ***Intranet:*** Software that makes it easy to create web pages and serve up content (e.g., Guru and Zoom Workvivo)
- ***Collaboration:*** A set of applications for online collaboration (e.g., Atlassian and Cisco Webex)
- ***Enterprise Search:*** Advanced search tools that replace or expand on existing search engines and that connect multiple sources of content across an enterprise (e.g., Coveo and Glean)

If some of these platforms already exist in your organization, start by determining if they can be used as is or adapted to meet your needs. When acquiring new software, ensure that it can be readily integrated with the existing platforms. Determine if prospective vendors will assist in installing, operating, updating, integrating, and extending their software. Choose software that best meets your top requirements and can be used with other applications as your needs evolve.



Chapter 11: Integrate, Innovate, and Iterate

STEP 11. Integrate KM processes with other processes and workflows, integrate KM tools with each other and with other systems, and integrate KM with related programs and functions. Innovate key KM processes and tools to implement the strategy and achieve the vision. Regularly solicit user input and use it to continuously improve.

After the initial implementation of knowledge management components, your work is not over – it has just begun. Integrating KM into the fabric of the organization is an ongoing process. Improving the KM environment through continuous innovation is important. Asking about what users think of the current state, determining what changes are needed, and then revising components accordingly through successive iterations is a never-ending cycle that will help maintain the success of your KM program.

Integrate

Effective process, platform and software integration can help achieve a productive knowledge management ecosystem. Smoothly integrating processes, workflows, platforms, applications, systems, and software makes life easier for users and delivers improved business results.

Integrating KM into the flow of work increases the likelihood that users will take advantage of KM functionality. Integrating KM with related programs such as innovation and related functions such as Learning & Development avoids redundancy and improves efficiency. Integrating diverse tools makes it easier for users to go to one place for everything they need and improves the user experience. Integrating skunkworks projects recognizes that multiple innovators can contribute useful tools.

Resource Survey

Before acquiring or developing new tools, it's important to find out what software is already installed and available. Conduct a resource survey to evaluate existing knowledge resources and to determine which ones to add. It allows you to learn which resources are worthwhile, which ones are not, which ones you should learn more about, and which ones should be added. This should be conducted once when starting a KM initiative to help select the KM components to use, and every one to three years thereafter to make adjustments to the ones selected.

Here is an example of a survey you can use.

1. Demographic Questions

- What is your e-mail address?
- What is your location?
- What is your organization, including group and subgroup?
- What is your job role?
- How many years have you worked in the organization?

2. Multiple Choice Questions: For each of the following knowledge resources, please answer the first question. If the answer is "Yes," please also answer the second question. Provide a complete list of knowledge resources currently available in your organization. Use the 50 KM Components (see Chapter10) to help identify and categorize the resources.

a. In the last 30 days, have you used this resource?
- Yes
- No
- Don't Know

b. If you have used the resource in the last 30 days, how useful is it to you in your work?
- Very useful
- Moderately useful
- Not useful
- Don't Know

3. Open-ended Questions

1. Are there other valuable knowledge resources you use frequently? If so, what are they?
2. When you want to share your knowledge, where do you go first?
3. When you need to find knowledge to help you innovate, where do you go first?
4. When you need to find knowledge to reuse, where do you go first?
5. When you want to collaborate with colleagues, where do you go first?
6. When you need to find knowledge to help you learn, where do you go first?
7. Do you have comments about any of the knowledge resources mentioned in the survey?
8. What knowledge resources would you like to see added or created?
9. Are there knowledge resources you would like to see improved? If so, how?
10. What knowledge resources do you need to access but don't know if or where they exist?

Process Integration

Process integration for a Knowledge Management (KM) program means embedding knowledge management into the flow of work, connecting separate business systems to get knowledge flowing between them, and spanning boundaries to break down organizational barriers. To achieve this level of integration, you have to work with multiple business units and functions, other enterprises, and especially, your partners in the Information Technology (IT) department.

Seek out business units, functions, and departments that are not yet using knowledge sharing tools that could benefit their operations. Propose, pilot, and implement such tools for them. For example, in the marketing function, integrate blogging into their communications processes. For the IT help desk, integrate threaded discussions into their support processes. In the Human Resources (HR) function, integrate skills profiling and expertise location with the personnel database. In Learning & Development (L&D), integrate proven practices and lessons learned into the Learning Management System (LMS).

Integrating KM into Business Systems

Identify business processes that are related but not yet fully integrated through technology. Map the existing workflows between these processes and identify gaps that should be addressed through new workflows. Propose new and improved ways to connect processes through shared data, standard procedure calls, and software modifications. Here are examples of business systems and the KM components that can be used to integrate process within those systems.

- Sales and Marketing
  - Business: Customer Relationship Management (CRM), Sales Management, Marketing Management, Lead Generation and Tracking, Order Processing and eCommerce, Reservation Management
  - KM: workflow, process automation, analytics and business intelligence, artificial intelligence, blogs, podcasts and videos, portals, repositories, wikis, syndication, aggregation, and subscription management systems, content management
- Operations
  - Business: Enterprise Resource Planning (ERP), Operations Support, Engineering, Manufacturing, Distribution, Logistics, Inventory and Stock Control, Scheduling, Process Control, Procurement
  - KM: workflow, process automation portals, analytics and business intelligence, artificial intelligence, portals, repositories, wikis
- Research & Development (R&D) and Medical
  - Business: Research Management, Laboratory Information Management System (LIMS), Scientific Information Management, Intellectual Property Management, Clinical Information System (CIS), Hospital Information System (HIS), Electronic Medical Record (EMR), Electronic Health Record (EHR), Drug Information System (DIS)
  - KM: creation, workflow, process automation, analytics and business intelligence, artificial intelligence, portals, repositories, wikis
- Finance
  - Business: Accounts Payable, Accounts Receivable, General Ledger, Budgeting and Planning, Forecasting and Reporting, Expense Management, Funds Transfer, Investment and Portfolio Management, Shareholder and SEC, Tax Processing
  - KM: workflow, process automation, analytics and business intelligence, artificial intelligence, valuation, portals, repositories, wikis
- Human Resources
  - Business: Human Capital Management (HCM), Talent Management, Recruiting and Hiring, Personnel Data, Payroll, Staffing, Performance Management, Time Entry, Expense Reporting, Travel, eLearning, Learning Management System (LMS)
  - KM: workflow, process automation, analytics and business intelligence, artificial intelligence, portals, repositories, wikis
- Management
  - Business: Executive Information System (EIS), Management Information System (MIS), Decision Support System (DSS)
  - KM: proven practices, analytics and business intelligence, artificial intelligence, portals, repositories, wikis
- Program Management
  - Business: Portfolio Management, Project Management, Project Team Collaboration
  - KM: capture, reuse, lessons learned, proven practices, collaboration, team spaces, web/video/audio conferencing, portals, repositories, wikis

Spanning Boundaries

Process integration can have enormous value in creating new connections across previously isolated organizational silos. Boundary spanning integrates people who are not part of the same work unit. Here are examples of how to use KM approaches to do so.

- Weave together multiple functions and business units
  - Example: Connect people in R&D, Engineering, Manufacturing, Distribution, Marketing, Sales, Manufacturing, Finance, and HR.
  - KM: communities, threaded discussions and

Enterprise Social Networks, Social Network Analysis, Appreciative Inquiry and Positive Deviance, lessons learned, proven practices, collaboration, team spaces, web/video/audio conferencing, repositories, gamification applications, expertise locators and ask the expert, blogs, wikis

- Collaborate internally
  - Example: Create a single activity stream showing all business tasks.
  - KM: communities, threaded discussions and Enterprise Social Networks, Social Network Analysis, social software and social media, expertise locators and ask the expert, blogs, wikis, workflow applications
- Collaborate externally
  - Example: Connect internal project teams with partners and customers.
  - KM: collaboration, team spaces, web/video/audio conferencing, external access
- Integrate a new workforce
  - Example: Welcome the members of a newly acquired company.
  - KM: management of change, communities, threaded discussions and Enterprise Social Networks, Social Network Analysis, expertise locators, external access

Platform Integration

Effective process, platform and software integration can help achieve a productive knowledge management ecosystem. Smoothly integrating processes, workflows, platforms, applications, systems, and software makes life easier for users and delivers improved business results.

Platform integration for a Knowledge Management (KM) program means working with your partners in the IT department to make KM tools work effectively with standard platforms. This allows KM systems to take advantage of functionality available outside those systems, and for standard platforms to provide data to and obtain data from KM systems.

Integrate knowledge management with widely used business platforms. Feed data into these systems, extract data from them and feed it into KM systems, connect workflows, and enable enterprise search to find content. Here are examples of popular platforms to consider.

- Customer Relationship Management (CRM): Salesforce Sales Cloud,
  Oracle CRM, Microsoft Dynamics 365
- Enterprise Resource Planning (ERP): SAP, Oracle NetSuite, Microsoft Dynamics 365
- Human Capital Management (HCM): SAP SuccessFactors, Workday,
  Oracle PeopleSoft

The four major technology platforms provide multiple opportunities for integration. Take advantage of their capabilities for knowledge management, office automation, artificial intelligence, and multimedia content. Here are suggested products and features to tap.

- **Amazon:** Books, Prime Video, Ordering, Alexa
- **Apple:** App Store, News, TV, Podcasts, Siri
- **Google:** Play, Books, Search, News, Scholar, Maps, Photos, YouTube, Translate, Docs, G Suite, Gemini, Meet, Chat, Drive
- **Microsoft:** Active Directory, Store, Copilot, LinkedIn, Microsoft 365: Outlook, OneNote, Teams, SharePoint, Engage, OneDrive

The IT department typically provides enterprise-wide platforms that individual business units and functions can leverage. KM should take advantage of these systems to avoid duplicating functionality, to obtain needed information, and to feed content that others are seeking. Here are examples of how to do this.

- **Single Sign On (SSO):** A single set of login credentials allows users to access all the applications relevant to them once they are on the network. This makes password management simple for individuals and for IT staff. SSO should work for all systems, including KM.
- **Virtual Private Network (VPN):** It should be possible for all employees and contractors to access enterprise systems from anywhere. This is especially true now when many people are working from home. A VPN allows users to login to secure systems and not have to come into the office to do so. External and remote access should be provided to all systems, including KM.
- **Enterprise Activity Stream:** Provide a single place to observe and interact with all events occurring in the various business systems and workflows. Integrating feeds from CRM, ERP, HCM and other business platforms with the Enterprise Social Network allows notifications, comments, and discussions to be associated with each event. The activity stream connects people interested in the same transactions and provides a transcript of key events.
- **Enterprise Search:** Your search application should be allowed to crawl all other systems and repositories so that it can return all possible results. Link it to specialized databases, applications, and collaboration tools. If it is not possible to directly crawl certain content, provide a link to the search engine that can be used for that content. Enable internal search to feed an external search engine such as Google so that results outside the firewall can be optionally returned along with internal ones.
- **Intranet:** The corporate intranet should be the gateway to all internal web pages, systems, and repositories. It provides an integrated user experience through a standard user interface, a consistent navigation hierarchy, an A-Z index, and an enterprise knowledge map.
- **Enterprise Taxonomy:** Defining a standard classification scheme arranged in a hierarchical structure can be used to organize information so that it can be readily found through navigation, search, and links between related content. Adopting a single taxonomy across the entire enterprise is a way of integrating diverse content.
- **Content Management System (CMS) and Electronic Document Management System (EDMS):** The KM environment should include a CMS and/or an EDMS or use

existing instances of these rather than replicating them or using different ones.

- **Metrics and Reporting:** If your enterprise has standard analytics tools for web page access, document usage, collaboration, and other activities, use these for KM metrics and reporting. KM metrics that can be published as part of regular business reports will get more attention than if produced separately.
- **Employee Directory:** Use standard HR databases for expertise location, project staffing, and social software profiles. Avoid requiring people to have to enter the same personal information over and over.
- **Office Automation:** KM applications that are tightly integrated with corporate email, calendar, and contacts will achieve higher levels of adoption than those that are not. This is because even though everyone complains about email, they also regularly check it. Threaded discussions and ESNs should allow email to be used to post and reply. Community events should appear in personal calendars, provide reminders, and be linked to agenda pages for each meeting. Community membership rosters should be reflected in the Employee Directory and fed to personal contact lists.
- **External Content:** Connect internal information libraries and communities to sources located outside the firewall. These include market research (product intelligence, competitive intelligence, customer intelligence, and market intelligence), subscriptions (news, press releases, databases, industry data, analyst reports, periodicals, blogs, podcasts, streaming video, and audio books), and other online resources (websites, repositories, libraries, archives, knowledge bases, online discussions, and communities).

Software Integration

Software integration enables a variety of independently developed tools to be interconnected in useful ways. This avoids the need to require a single platform and allows independent software to be developed, best-in-class products to be selected for each business need, and innovation to be encouraged and embraced.

Mix and Match

It's tempting to use a single system for all office, collaboration, and knowledge management applications. A common example is "we're a Microsoft shop," meaning that non-Microsoft applications are not considered, acquired, or installed. Microsoft 365 is good at a lot of office, collaboration, and KM tasks, so it's a logical choice for a single platform.

Other enterprises have standardized on Google, IBM, Salesforce, Oracle, SAP, and other vendors, each of which is better at some tasks than others. Instead of rigidly locking into one vendor while locking out others, it's a good idea to standardize on open interfaces that allow diverse tools to be readily integrated. This allows mixing and matching software components that are ideally suited for each key task.

The intent of using open interfaces and a variety of components is to encourage new and better ways of accomplishing key tasks. Watch out for an unintended consequence: different groups creating their own versions of software for the same purpose. It's better to choose one application for each task and avoid redundant versions. This avoids user confusion, focuses effort on extending functionality instead of replicating it, and results in a more comprehensive portfolio of integrated technology. APIs, hashtags, LDAP, RSS, search, and web parts can be used to integrate tools that are both homegrown and purchased. Here are details on each method.

- **APIs** (**Application Programming Interface**) are subroutine definitions, protocols, and tools for building application software. They are a set of clearly defined methods of communication between various software components. For example, the Google Maps API lets developers embed Google Maps on websites using a JavaScript or Flash interface. The Google Maps API is designed to work on mobile devices and desktop browsers.
- **Hashtags** are a type of metadata tag used in social software. They let users apply dynamic, user-generated tagging that helps other users easily find content in a specific category or with a particular theme. Users create and use hashtags by placing a hash symbol (#) in front of a word or unspaced phrase in a message or applying it to an existing post. For example, if you encourage users to add the #reused hashtag to all content that they were able to successfully reuse, you can program enterprise search to elevate such content to the top of the search results. Or you can tag discussion threads that include examples of successful KM in action with the #wins hashtag and automatically display them on a success stories page.
- **LDAP** (**Lightweight Directory Access Protocol**) is a mature, flexible, and well supported standards-based mechanism for interacting with directory servers. It's often used for authentication and storing information about users, groups, and applications, but an LDAP directory server is a general-purpose data store and can be used in a wide variety of applications. For example, LDAP integration allows a knowledge base to use an existing LDAP server as the master source of user data for authentication.
- **RSS** (**Really Simply Syndication or Rich Site Summary**) enables syndication (a way of providing content such that it can be subscribed to using a feed reader, integrated into a website as a subset of that site, or aggregated with similar content) and aggregation (a way of collecting multiple syndicated feeds into a single feed or as part of a unified website). For example, RSS feeds can be used to aggregate all content produced by a single user into a single view on that person's profile page. This could include blog posts, wiki page edits, and threaded discussions. Another example is pulling in a variety of subscription feeds and displaying them in a single stream.
- **Search** can be used to find content in different sites and repositories and return it to a single user screen or application. For example, a saved search using a specific set of search terms can be regularly performed and the results fed to predefined pages and users.

- **Web parts** are server-side controls that run inside a web part page. They are the building blocks of pages that appear on a website. They can be used to integrate one application into another. For example, an Engage group can be embedded into a SharePoint site.

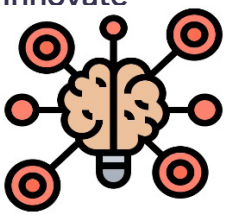
Integrate Emerging Technologies

Knowledge management programs should take advantage of new and emerging technologies through software integration. Here are a few suggested ways of doing so.

- **Mobile devices:** Create specialized KM apps and allow other apps to access data from and provide data to these KM apps.
- **Texting:** Allow users to text queries and receive replies, receive alerts from KM apps, and subscribe to get notifications from saved searches.
- **Chat:** connect tools such as Slack ant Teams to other collaboration tools and community software.
- **Enterprise Social Networks:** Embed ESN threads into all important application software.
- **Artificial intelligence:** Use autoclassification to assign metadata to documents contributed to repositories. Automatically review uploaded videos to annotate them with the times that specific topics are covered and allow viewers to go there directly. Take advantage of Generative AI by adapting it for internal use in enterprise search and in many other contexts.
- **Analytics and business intelligence:** Distribute automated email messages with recommendations for decisions and actions by extracting insights from collected data.
- **Gamification and digital badging:** Feed all qualifying KM and L&D activities into gamification systems and automatically display all earned digital badges on personal profiles.

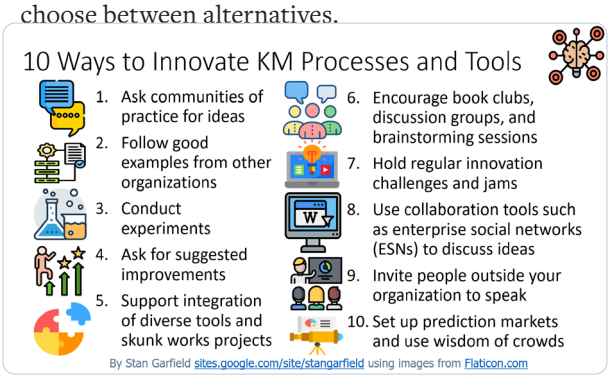
Without being integrated into an organization's infrastructure and workflows, a KM system will never reach its full potential, no matter what features and functions it offers. Knowledge management tools should integrate with existing systems and applications, leverage existing assets (including people and repositories), and work seamlessly with the current IT infrastructure. With good integration, you don't need to overhaul your entire information architecture. Instead, you can connect existing resources so that users get exactly the information they need when they need it. Develop a holistic integration strategy, and your KM platform will be your organization's knowledge engine.

Innovate

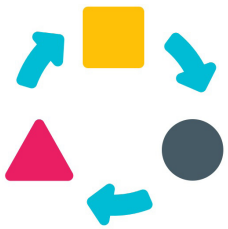


Once a KM system has been implemented and integrated with other systems, that is still not the end of a KM project. It should be the beginning of a continuous cycle of improvement, using proven innovation practices. Here are ten ways to stimulate innovation to improve the KM environment.

1. Ask communities of practice, both internal and external, for ideas.
2. Follow good examples from other organizations, such as the Netflix prize, P&G Connect & Develop, IBM Garage, and Wazoku (formerly InnoCentive).
3. Conduct experiments to test new methods. Use analytics to analyze the results and pick the ones that are most effective.
4. Ask for suggested improvements, use rapid prototyping to try them out, and then iterate and improve.
5. Enable innovation by supporting integration of diverse tools. Encourage skunkworks projects.
6. Encourage the formation of book clubs, discussion groups, and brainstorming sessions to get people thinking about new and better ways of doing things. Take the best ideas and implement them.
7. Hold regular innovation challenges, tournaments, and jams.
8. Ask people to use collaboration tools such as Enterprise Social Networks to discuss ideas for improvements, new approaches, and breakthroughs.
9. Invite people outside your organization to speak on calls, present at meetings, and participate in workshops. Adapt their methods for use in your organization.
10. Set up prediction markets to use the wisdom of crowds to choose between alternatives.



Iterate



Knowledge management programs can use a wide variety of people, process, and technology components. It's important for KM program leaders to gain direct experience with as many of these components as possible, to evaluate their possible application, and to lead the way in implementing new ones to fill current and future needs.

Classic software development projects included lengthy time allocations for analysis, design, and development before users ever had a chance to try out the results. Given that it is difficult to know exactly what features users want and how they should actually work, the "finished product" would often be unsatisfactory to the users for whom it was developed, despite the fact that it met their specifications.

A more useful approach involves rapidly developing a prototype, letting users try it out, capturing their feedback, and then improving it accordingly. My colleague at both Washington University and St. Louis University, Dave Bridger, used to say that a software program should be measured not by how closely it met its design specifications, but rather by how useful it was during its development. Programmers who rapidly develop, test, and refine save time, please users, and deliver better results.

Knowledge Management programs and intranet systems often make the same mistakes as software development projects. Lengthy designs or redesigns are followed by big launches and then by users disliking or ignoring the touted offerings. I call this the "big bang" approach, such as when a new or revised website is unveiled after six months of development, only to miss the mark as judged by its intended audience. What are the users supposed to do during the time prior to launch? It's much better to quickly launch a simple website serving up the most important content (as defined by the users) and then continue to improve and add more content on an ongoing basis. This results in a website that is both immediately useful ***and*** perceived as being continuously improved.

As soon as you have a potentially good idea for a people, process, or technology innovation, try it out. Start by discussing it with a group of trusted colleagues, fellow members of a community of practice, or insightful friends and family. Mock up a simple picture, screenshot, or process flow. Encourage candid comments and suggestions – then incorporate as much of this feedback as possible in your initial design.

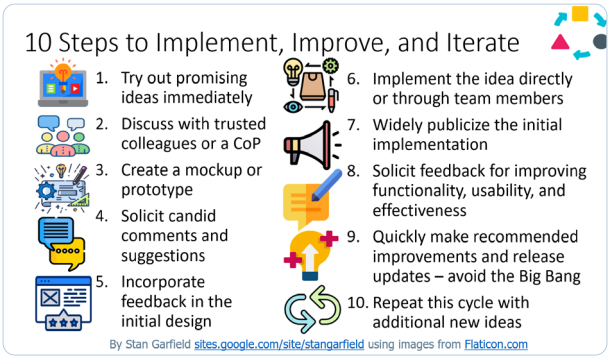
Implement your idea directly, through a colleague, or through a team good at development. Do this sooner, rather than later. Publicize your initial implementation through a relevant community of practice, your social network, and your work team. Solicit user input for improving functionality, usability, and effectiveness. Then quickly make improvements and repeat the cycle. Continue this process indefinitely, with longer cycle times as functionality better aligns with user requirements. The Agile development methodology described in Chapter 10 is an excellent approach to use.

New KM tools are being developed and made available with increasing frequency. For the ones with great personal appeal, relevance to your organization's needs, or the potential to be widely adopted, it's a good idea to get out in front of future demand and try them out. This embodies learning by doing, leading by example, and modeling desired behavior.

At HP, the KM team followed this principle in implementing new tools. These included:

- **KM Stars:** a recognition and rewards program and system
- **me@hp:** a social networking profile, similar to Facebook or LinkedIn
- **Searchable:** a single search platform that connected to multiple domains

After coming up with the idea for **KM Stars**, I asked Andrew Gent, the technology lead, to develop a prototype. I gave him the initial design, the team discussed it, and Andrew implemented it. He then announced it to the HP KM Community in the threaded discussion, presented it on one of the community's biweekly calls, and solicited suggested improvements. He repeated this cycle several times, and the result was a system that was widely adopted and used. Andrew took a similar approach with **me@hp** and **Searchable.**



Chapter 12: Share, Seek Feedback, and Pay It Forward

STEP 12: Share achievements and ideas with others. Seek feedback on your program and reuse the proven practices of other programs. Conduct periodic employee satisfaction surveys. Pay it forward, meaning that if you help people with their KM efforts, they in turn will help others, creating a virtuous circle.

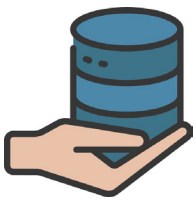
Once your KM program is up and running, it may seem that your focus should be kept within your organization. After all, there is still a lot of work to do to maintain and improve the program without adding any outside distractions. You may think that your efforts are unexceptional and that other external groups wouldn't be impressed by what you have accomplished.

But there are good reasons to share about your KM program outside of your organization. In telling your story, you become aware of the key points to emphasize and how they are viewed externally. This can help with internal communication as well. The feedback you receive provides a fresh perspective different from the sometimes jaded internal views. External connections made while sharing offer the chance to learn about and adopt useful practices from other organizations.

Sharing your lessons learned is a way of paying it forward while practicing what you preach. You want the people in your organization to share their knowledge as part of your KM program, so you should do the same in the broader profession of knowledge management. By doing good for others, you set an example for them to follow so they will do the same. Eventually, that will come back to you in the form of shared ideas that you can reuse.

It's also useful to find out what the users of your KM program think about it. While you can't please everyone, and there will always be those who complain and are hard to satisfy, knowing what your target audience would like to see done differently can help you improve the program and demonstrate your responsiveness to constructive criticism. Expending extra effort to convert critics into boosters can really pay off, as both you and your former critics tell their stories of why they now believe in the KM program.

Share



By being active in external communities and conferences, you will be able to learn from others, benefit from a wide variety of perspectives and experiences, and apply good ideas in your program. Helping people with their KM efforts, so that they in turn help others, results in a virtuous circle. This is good for everyone involved.

Relentlessly share what you know and have learned. Publish your experiences, philosophies, and insights. Post your ideas in communities of practice, solicit feedback, ask questions, and reply to the questions and comments of others. Present regularly and invite others to do the same. Compare your efforts to others, incorporate their good ideas, and evolve your thinking.

How to Share What You Have Learned

1. **Join and participate in communities**
   - Ask questions, seek help, and request advice
   - Answer questions and respond to requests
   - Lead, help lead, and present on calls
2. **Post in social media**
   - Bluesky or X
   - LinkedIn
   - Medium or Substack
3. **Publish**
   - Articles in periodicals and journals
   - Presentations
   - Books or book chapters
4. **Accept requests to be interviewed**
   - Podcasts and videos
   - Webinars
   - Articles
5. **Present and lead discussions**
   - Present regularly within your organization, to other firms, in community meetings, and in client meetings.
   - Offer to present on a webinar sponsored by a company or organization relevant to your specialty.
- Lead discussions online and during live events.
6. **Create and curate a personal website on Google Sites or equivalent**
   - Share all of your content
   - Link to external sources that include content from you
   - Link to other useful resources
7. **Deliver training**
   - Develop and conduct training
   - Host and appear on podcasts
   - Create and upload videos
8. **Serve as a mentor**
   - Volunteer to participate in a mentoring program
   - Engage with potential mentees until matched
   - Hold regular mentoring sessions
9. **Attend industry conferences**
- Conduct workshops and give presentations
   - Lead and participate in panel discussions
   - Meet new people, participate in conversations, and arrange for future benchmarking visits

10. **Host and go on site visits**
    - Participate in formal programs such as those led by APQC
    - Invite contacts made at conferences
    - Visit other sites to share and learn

Seek Feedback

Here are five good ways to gain a better understanding of how your KM program is doing.

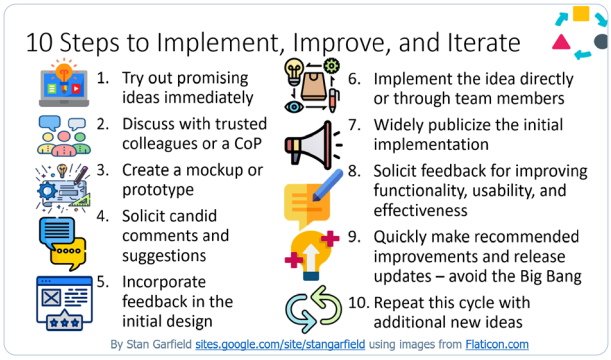
1. Ask for responses in community online discussions and on community calls.
2. Talk to attendees at industry conferences about your program and compare notes.
3. Bring up examples from your program during training sessions you attend and gauge the responses from the other participants and the instructors.
4. Host site visits from leaders of other KM programs to solicit observations and suggestions.
5. Conduct employee satisfaction surveys. Here is an example.

Employee Satisfaction Survey

Use this survey on an ongoing basis to set a baseline and measure progress. It allows you to learn how your users view your program, what is perceived as working well, and what you need to improve. This should be conducted with a representative sample of the population on a monthly basis after the start of a KM initiative. If the results reach a fairly stable level, then the frequency can be reduced to once a year. Include the results in your regular program metrics reporting.

Here is an example of questions you can use. You can adapt these as necessary to your situation.

1. How satisfied are you with your manager's support for you spending time on knowledge sharing and reuse?
2. How satisfied are you with your ability to access knowledge resources when you are not connected to the network?
3. How satisfied are you with the ability of knowledge reuse activities to save time and/or effort in your work?
4. How satisfied are you with your ability to find the information and knowledge you need to do your job?
5. How satisfied are you with the system availability of the online knowledge resources you use most often?
6. How satisfied are you with the experience of searching repositories to find reusable content?
7. How satisfied are you with the experience of locating an expert?
8. How satisfied are you with the ease of collaborating with internal colleagues?
9. How satisfied are you with the ease of collaborating with customers, partners, and external colleagues?
10. How satisfied are you with your ability to join, participate, and derive value from communities of practice?
11. How satisfied are you with training and documentation for using knowledge resources?
12. How satisfied are you with the services provided by the knowledge help desk?



Pay It Forward

Paying it forward means to do good for others without expecting anything in return. If you do so, you will often receive benefits at a later date when you most need them. When I was about to leave HP, the legal department contacted me about a job opening. It was too late for me to take it, so I recommended another KM practitioner who was looking for a job and who was eventually hired. That good deed, done selflessly, was eventually rewarded. I ended up working at Deloitte, partially as a result of having met Deloitte KM people at a KM conference at Babson College who referred me for the job.

When asking for favors, reciprocating is expected and mutually beneficial. When I asked the head of proven practice replication at Ford to present to the HP KM community, he agreed. And then he asked me to present to Ford. I didn't think I had anything worthwhile to present, but I did so. Ford's reaction was unexpectedly positive, and this gave me the confidence to share my experiences more widely, leading me to present and write on an ongoing basis.

Similarly, I gave presentations to Accenture, Cisco, and IBM, and they did the same for me at HP. They also developed KM recognition programs that built on what we had done at HP, When I later needed outside support for attempting a similar effort at Deloitte, they agreed to present to the KM leadership team.

Chapter 13: 10 KM Insights

These insights come from my time leading KM and communities programs at Digital Equipment Corporation, Compaq, Hewlett-Packard, and Deloitte. They can be applied in any new or existing KM initiative.

1. Collect content; connect people

- Link to repositories within discussions.
- Collect basic details in repositories; connect for more.
- Enable search for content, discussions, and people; use formal taxonomy, social tags, and best bets.

Collect Content* and *Connect People.

Knowledge Management programs have frequently started out by focusing on collecting content: "Let's gather all documents ever created and publish them in the official knowledge repository." This approach didn't work well and resulted in backlash, leading to a new movement to focus instead on connecting people: "Let's create communities of practice and social networks, and then everyone can share content at the time of need and in context."

Both collection and connection are valuable, and neither one should be emphasized over the other. Without context, content is not very useful. But without content which can be referenced and reused, communities and social networks will continually need to share information stored on personal hard drives or web sites.

Collection includes processes and repositories for capturing explicit knowledge. Connection includes collaboration, communities and Enterprise Social Networks for sharing tacit knowledge. Enabling, promoting, and supporting both collection and connection will help both tacit and explicit knowledge to flow. Looking for ways to link connection and collection will help a KM initiative to succeed.

Methods for bridging collection and connection include social tagging, recommendations, and a "like" feature. Finding collected content can be enhanced through people-centric features such as search best bets, folksonomies, and upvoting. Enterprise search can be extended beyond content to include threaded discussions, blogs, wikis, social networking profiles, and other social business tools.

The Midwest KM Community is mostly about connection. It holds an annual face-to-face symposium. The SIKM Leaders Community combines connection and collection. It holds monthly calls, supports threaded discussions, and stores presentations and recordings that can be referenced by members at any time.

At HP, communities of practice offered structured content in practice portals and threaded discussions in HP Forums. Sales, pursuit, and delivery templates and kits in the practice portals were essential to the consulting business. But so were the questions and answers in the HP Forums. Often the answer to a question was a link to a document in a practice portal. And frequently, the most useful results in HP enterprise searches were found in the HP Forums.

2. Lead by example; model behaviors

- Practice what you preach.
- Post, reply, like and praise online.
- Use a KM Community to show how to lead a community.

Lead by example, practice what you preach, and model desired behaviors.

Many knowledge management programs begin as grassroots efforts or skunkworks projects, gaining users from the ground up. Others are launched by top executives through formal communications imploring members of the organization to participate. The most successful implementations combine both of these methods, while adding one more: the executives and their staffs not only communicate about the initiative, they actually participate themselves in a visible manner.

Employees are used to receiving messages asking them to use some new process or tool. They tend to ignore these requests unless there is some obvious benefit to them, they expect to be directly measured on compliance or punished for non-compliance, or they have a personal interest or emotional connection to the topic. Another way to get the attention of employees is if they see top management directly using the process or tool.

You can read about new technology, attend seminars about it, and receive advice from analysts and consultants recommending that your organization adopt it. But the best way to learn about a new technology is to use it yourself. You have to try out technology in order to manage it effectively, so don't delegate it to a task force or steering committee – jump in and start using it.

Members of the organization will watch the actions of their leaders and supervisors. If they perceive that the message is "do as I say, not as I do," they will be unlikely to do what is requested of them. But if employees observe management actually taking its own advice, they are much more likely to follow suit.

"Practice what you preach" is a good motto. If you tell employees to join communities, you should visibly be an active community leader or member. If you want people to start blogging, you should

blog regularly and let everyone know about it. To get users to edit wiki pages, you should create and edit some pages yourself.

KM program leaders should be leading the way in blogging, posting and replying to threaded discussions, creating and editing wiki pages, contributing documents and videos to repositories, podcasting, sharing links, and using social software. They should create or help lead a knowledge management community to set an example of how to lead a community of practice.

Knowledge management leaders should be core members of external KM communities, active users of social media tools such as Bluesky and LinkedIn, and regular bloggers or writers. They should post and reply to KM discussions, present on KM calls and at industry conferences, and publish articles in periodicals.

If the leader of a KM program is known to be an expert user of all the tools promoted by the program, members of the organization are much more likely to respect that person and follow their example. If the leader of an organization is seen to be posting in the Enterprise Social Network, many members of the organization will reply and start posting on their own. If the manager of a specialty is an active member of the community of practice for that specialty, others will also join and participate in the community.

Model the behaviors you want others to demonstrate. Share, innovate, reuse, collaborate, and learn in an open and visible way. If you span boundaries, build networks, and communicate openly, others will follow your example, and you will get the results you want.

At HP, an internal blog platform was created as a skunkworks project in the imaging and printing group. Initial participation was limited to a few early adopters. Then the executive vice president of the group started an internal blog, and it was obvious that he was actually writing and posting himself, not through a ghost blogger. This triggered many members of the group to comment on his blog, create their own blog posts, and comment on each other's posts. Morale increased, as employees could see that their senior leader was soliciting their advice and reading and replying to their comments.

Also at HP, a social networking profile called me@hp was launched and gained a small number of users each week. When the senior vice president of the consulting business posted her profile and sent out a note to the entire organization about it, there was an immediate spike in new profile creation.

As a KM leader both inside and outside of the companies where I worked, I have led KM communities, run regular calls, published newsletters and blogs, maintained social networking profiles, used Bluesky and Engage (formerly Yammer), edited wiki pages, used collaborative team spaces, posted to threaded discussions and ESNs, presented on calls and at conferences, hosted speakers from other companies and presented to their companies, created and managed websites, and published articles and books.

As a result, I know first-hand the ins and outs and pros and cons of using these tools. I can offer credible advice to others, I have a strong network of colleagues to call on for help, and I have helped build a good reputation for the organizations I represented. If I suggest that someone should join a community, post in an ESN, write a blog post, or use a wiki, I can say that I have done so and offer to help them get started.

3. Set goals; recognize and reward

- Set 3 goals; make them simple, fundamental, measurable.
- Consistently communicate and leverage the 3 goals.
- Recognize and reward those who achieve the goals.

Set Goals, Establish Promotion Requirements, and Recognize and Reward.

See Chapter 21 for details.

4. Tell your stories; get others to tell theirs

- Engage listeners.
- Provide real examples.
- Demonstrate value.

Tell your stories, and get others to tell theirs, especially stories of both success and failure.

We have all had to endure endless talking heads giving PowerPoint presentations filled with text bullets, clichés, and charts that can't be read. Rather than continuing this sad tradition, tell stories that engage your listeners instead of boring them to death.

When my daughters were sophomores at Michigan State University, I was asked to give a presentation on knowledge management as a possible career choice. I drafted a detailed slide deck with lots of bullet points and details on KM and sent it to my host, the chairman of the advertising and public relations department.

He provided very helpful feedback to the effect that 400 students in a lecture hall on a spring afternoon would quickly lose interest in such a presentation. Taking his advice to heart, I started over and created slides with more images that enabled me to tell stories instead of reading bulleted text. This led to a successful session.

When telling stories, don't pontificate. Leave out jargon, buzzwords, and corporate speak. Avoid wishful thinking; offer practical ideas instead. Provide real examples, rather than just metrics, statistics, and analytics.

One type of content that should be a priority for many of your communication vehicles is the success story. These should be requested regularly from users in one of three ways.

- Ask all KM leaders to submit them each month and include them in the monthly newsletter.
- If you have a KM incentive system, request success story content as part of giving out points for desired behaviors.
- Monitor the community's threaded discussions for testimonials of how the community helped a member in a

time of need.

When capturing success stories, ask the following questions:

- What challenges did you face?
- What knowledge resources did you use?
- How did you use these resources to address these challenges?
- What was the outcome?
- What benefits did you realize from using the resources? (time saved, costs avoided, new business won, incremental revenue, problems avoided, increased customer satisfaction, accelerated delivery, innovation, process improvement, etc.)
- What benefits did you and your organization derive?
- Did anyone else benefit as well (e.g., a community)?
- What alternatives (instead of using the knowledge resources) did you consider?
- Which alternatives did you try?
- If you had not used the knowledge resources, how do you think the outcome would have been different?

Demonstrate value by collecting and telling reuse stories, not by trying to compute the return on investment (ROI) of a KM program. Ask those who reuse knowledge to tell those who contributed it how their content was useful, not by rating it with one to five stars.

Success stories are very important, but stories of failure can be even more powerful. These are harder to elicit, because people are reluctant to expose their failings to a large audience But if you can create a safe environment for doing so, these stories will grab the attention of others and likely help prevent the recurrence of whatever mistakes were previously made.

Communities can be nurtured by having members tell personal stories of who they are and knowledge-sharing stories about what they have learned. The effectiveness of training and communications will be enhanced by using narratives rather than dry bullet points. For example, instead of creating the usual PowerPoint slides to present the KM program, tell the stories of some typical users and how they apply the components of the KM program to help them do their jobs.

Lessons learned can be captured and reused with greater impact if they are told as stories rather than captured as imperatives in text format. Proven practices captured as pictures, video, and audio telling the story of how to apply them will be easier to replicate than if they are in a written document. Collaboration can be stimulated by using narrative to get others working together.

According to Steve Denning, almost all forms of narrative are useful in change management, including motivating others to action, building trust, transmitting values, getting others working together, taming the grapevine, and creating and sharing a vision.

Appreciative Inquiry is based on storytelling. In Five Theories of Change Embedded in Appreciative Inquiry, Gervase Bushe writes, "The key data collection innovation of Appreciative Inquiry is the collection of people's stories of something at its best. If we are interested in team development, we collect stories of people's best team experiences. If we are interested in the development of an organization, we ask about their peak experience in that organization. If enhanced leadership is our goal, we collect stories of leadership at its best. These stories are collectively discussed in order to create new, generative ideas or images that aid in developmental change of the collectivity discussing them. There is something about telling one's story of peak organizational experiences, and listening to others, that can make a group ready to be open about deeply held desires and yearnings.".

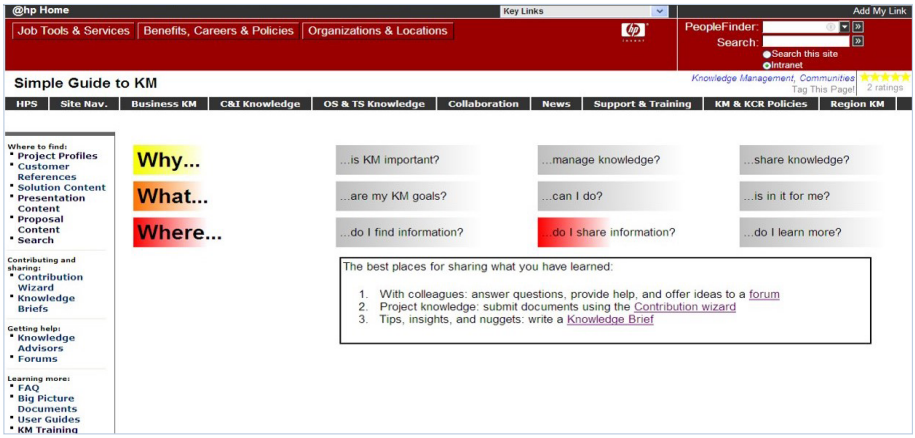
5. Use the right tool for the job; build good examples

- Recommend uses for each tool.
- Enable effective use by simplifying the array of available tools.
- Create prototypes, mockups, and initial examples.

Provide examples to help people use the right tool for the job.

Instead of rolling out tools by telling everyone to start using them, recommend specific uses for each tool. For example, rather than saying "Start collaborating," provide ESN users with SAFARIS (see Chapter 7).

To help people choose which tool to use, provide KM users with a simple guide. This is the one we developed for use at HP:



HP's Simple Guide to KM

For social media tools, provide details on when to use each one, and when NOT to use them: This is the matrix we developed for use at Deloitte:

Recommended Uses for Social Media Tools

Social Media Tool	Use for:	Do Not Use for:
Blog	• Sharing tips and tricks, links, and other insights broadly • Opinions • News • Communiqués • Chronological archive	• Repository content • Client material • Discussions
Wiki	• Shared document development • Shared agenda development • Ongoing editing of shared text	• News • Repository content • Client material • Discussions • Blog or chronological archive
Threaded Discussions	• Sharing tips and tricks, links, and other insights within a community • Questions & answers • Solving problems • Ad hoc, generic attachments	• News • Repository content • Client material

Knowledge management encompasses many technology components. To enable the effective use of tools, simplify the list of available tools and provide use cases and instructions for those that are essential and remain on the list.

Create prototypes, mockups, and initial examples so that users can try out tools, provide feedback to improve them, and not have to start from scratch. For example, HP created prototypes in a skunkworks. Deloitte provided community mockups for new communities of practice, and templates for collaboration spaces for the most common uses. And the Deloitte KM Community served as an example of how to use collaboration tools effectively for knowledge sharing in a community of practice

6. Stay inclusive; span boundaries

- Set the tone for a community.
- The wider and more open, the better.
- Don't exclude people (except pontificators, spammers, and trolls).

Be open and inclusive to connect people across organizational boundaries.

Different communities have different cultures. It's important for community leaders to set the right tone for theirs. For example, the SIKM Leaders Community is a "community of knowledge management leaders from around the world. It is open to all KM practitioners. Diverse opinions are welcome if expressed in a supportive and collaborative manner. Posts should be personal, relevant to KM, and not spam. Members should not send messages that are duplicates of those distributed through other channels. Instead, post one-time invitations to join other lists." As a result, the community is positive, helpful, and insightful.

The wider and more open communities and Enterprise Social Networks are, the better for knowledge sharing. *Boundary spanning* is building bridges across organizational boundaries to enable knowledge to flow between previously isolated groups. Connecting otherwise unconnected networks makes available previously unknown sources of knowledge.

The more community and ESN members who are paying attention, the better. I've never found any reason why the size of a community needed to be limited. If you have 1,000 members in a community and then member 1,001 joins, that's not going to cause any harm. Member 1,001 may begin learning and benefiting from the other 1,000 members. They may be able to answer questions and share useful information. There isn't any harm in it. In the case of community membership, more is better. If a community's volume of posts increases beyond a tolerable level, the community can be split up to return to more acceptable levels of activity in each newly formed community.

Ask people if there would be any harm if those they don't know join the group and are able to benefit from what is being shared, or if they are able to answer a question. The answer will likely be a reluctant "no," which should help them realize the benefits of being more inclusive. And once outsiders join and contribute, they become trusted, and the original concern is reduced or eliminated.

I worked in an organization that had a private ESN group. After it had been in existence for over a year, I asked if there would be any harm if outsiders joined the group. The answer was no, so we opened it up. As a result, others were able to benefit from what was being shared. In the seven months since it was made open, it grew from 400 members to 1,250 members. No attempt was made to grow or promote the group, but there was obviously a lot of interest in what was being shared. The open group yielded benefits to 850 more people, with no additional effort.

The decision to make a community open or closed is often based on a perception of "us versus them". Some people feel safe only with people they know. But when asked about the harm of an outsider joining, these people have difficulty providing a convincing answer.

As a general rule, don't exclude people from communities or ESN groups. Exceptions can be made for pontificators, spammers, and trolls, but these are more common in Internet platforms where they can remain anonymous.

I lead the SIKM Leaders Community, which requires members to identify themselves when requesting membership. It started out as being just for KM practitioners in the systems integration industry, but we quickly opened it to all KM practitioners. Since its launch in 2005, I have only had to intervene twice based on posts in the threaded discussions.

A new member posted multiple times to promote his own community and events. I sent him a private email to remind him that members should not send messages that are duplicates of those distributed through other channels, and to post one-time invitations to join other lists instead. When he persisted, I removed him as a member. That was the only time I had to do so. He sent me a blistering attack in an email, which I ignored. When I later compared notes with other community managers, they told me that they had done the same with this person.

Another new member replied to a couple of posts with harshly worded criticisms. I sent him a private email to suggest that he take a more congenial approach to commenting. He replied to acknowledge my point, and shortly after, left the community voluntarily.

At HP, we supported the creation of boundary-spanning communities, not niche ones. At one time, there was a list of communities called K-Link that had thousands of redundant and overlapping entries. We replaced this with a Community Directory and restricted the creation of new communities to prevent redundancy. For example, requests for new communities for collaboration and SalesForce were redirected to use existing ones for knowledge management and customer relationship management, respectively.

In the case of geography-specific communities, we encouraged the formation of local chapters rather than separate communities. For knowledge management, this resulted in local chapters for Italy and Spain that still used the global English-language online discussion but had subsites in SharePoint for local-language files and meeting calendars.

The HP KM community, called **knowledge@hp**, spanned all of HP. It had threaded discussions, biweekly calls, and a SharePoint team space open to all. Similarly, Deloitte had a global KM community.

7. Prime the pump; ask and answer questions

- Post questions on behalf of others.
- Redirect one-to-one messages to one-to-many.
- Pose questions to stimulate discussion.

Prime the pump in threaded discussions by sharing tips, asking questions, and answering questions asked elsewhere.

Threaded discussions and ESNs won't start by themselves. Community managers need to act as catalysts by posting regularly to ask and answer questions, start discussions, and share useful information. They should post questions on behalf of others who are initially reluctant to do so themselves, redirect one-to-one messages to one-to-many, and think of questions likely to receive answers from others.

People often reply with "reach out to <name>" which results in private communication. If you see this in an online discussion, ask them to communicate using the same discussion. You can send a private email to <name> with a link to the thread and a request to reply there.

Community managers should set a calendar reminder to post every week with a summary of a community event, a useful link (save these in a list and share one each week), or a thought-provoking topic to stimulate discussion. If they see relevant discussions taking place in email exchanges, distribution lists, or other collaboration channels or communities, they should redirect those to the community. If questions are asked via phone, email, text, or chat that the entire community can benefit from, ask the requester to post in the threaded discussion and reply there.

Potential community members will check it out before joining. If they don't see many posts, or if what they see is old or obsolete, they won't join. So it's especially important to seed new communities with good content before asking people to join. Once a community is running well, the community manager still needs to regularly monitor the level of activity but will not need to post as often as in the early stages. The other members should help keep it active.

8. Network; share knowledge

- Meet in person whenever possible.
- Share relentlessly.
- Ask others to reciprocate.

Build your network, share what you know, and pay it forward by helping others.

If you have a chance to meet someone in person, do so. When you will be visiting a city or attending a conference, let people who live there or will also be attending that you will be available for a chat. If someone asks to meet with you, accept their invitation. When a colleague will be visiting your city, invite them to stay with you, or take them out for a meal.

I joined Deloitte in 2008 as the community evangelist. The first thing I did was to initiate discussions with others who were interested or involved with communities and collaboration. My first call went well, and at the end, I asked my colleague if she would like to continue talking every other week. She agreed, so I scheduled a biweekly call with her. I also asked her for the names of others I should call. She gave me the name of a second person. I then talked to him, and at the end of that call, I repeated the offer for a regular call and the request for more people to contact. He also agreed to the call and gave me more names. It made more sense to have one biweekly call than to have two different ones, so I invited him to join a three-person call.

This pattern continued as I talked to additional colleagues, all of whom agreed to join the biweekly call and offered more names. I called this fledgling community the Communities Interest Group, and I created an email distribution list to invite the members and remind them of the calls. Members would tell other colleagues about the calls, so by word of mouth, people contacted me and asked to be added to the list. This was a form of paying it forward, as the names provided to me and the word of mouth led to a

growing and valuable community, which eventually merged with other groups to become the Deloitte Knowledge Management Community.

9. Let go of control; encourage and monitor

- Set guidelines and rely on existing codes of conduct.
- Communicate, encourage, and trust.
- Monitor, garden, and allow the network to police itself.

Let go of control, encourage participation, and monitor behavior.

Social business implementation inside of corporations faces barriers to adoption. Business management may worry about allowing all employees to express themselves and post whatever they want. They are concerned about people posting negative comments, sharing confidential information, and not adhering to standards and guidelines imposed from the top down.

Over-regulation will just drive sharing elsewhere. It's better to see what is going on than to drive it underground in skunkworks, non-sanctioned sites, etc. Email can be used to share confidential information, and unless you plan to monitor and control all email, don't worry about social media.

Let the users enforce guidelines or inform admins about potential problems. Provide a link to report inappropriate content, engaging everyone in monitoring and policing social activity. Treat violations with force but assume that everyone is to be trusted until they prove otherwise.

Don't spell everything out. Issue guidelines, not policies. Link to existing employee conduct policies, or tweak them to incorporate social media, rather than create separate ones for social media. Provide good examples to follow. Take advantage of the fact that within an enterprise, each user's identity should be known, so there is strong motivation to avoid inappropriate behavior.

Monitor social activity using wiki watch pages, RSS feeds, and email notifications to be alerted to new or modified content. Communicate regularly and clearly to encourage responsible participation. Above all else, use common sense.

There is one key exception where control is in fact warranted: creation of new communities. This prevents silos that isolate people who could benefit from being connected and achieves critical mass for each community, helping to ensure that each one succeeds and takes advantage of scale.

10. Just say "yes;" be responsive

- Ask users what they want.
- Don't argue.
- Deliver quickly.

Try to give users what they want by asking, listening, and responding quickly.

Any initiative will fail if it does not meet the needs of its intended audience or is perceived as being created in isolation. To prevent this from happening, treat your users as customers whom you are trying to acquire, satisfy, and keep. Use virtual teams and communities to continuously solicit, capture, and respond to the needs of the people in your organization. Establish ongoing methods for two-way communications. Interact in ESNs, conduct surveys, publish newsletters, and maintain websites. And above all, listen to what your constituents tell you, and take timely action in response.

When you receive criticism, negative feedback, or suggested changes that may be difficult to implement, it's natural to become defensive, responding with apparently reasonable explanations for the status quo or rejections of requests. It's useful to pause before doing so, and instead, think about the reasons for the input being provided. The people offering it have what appear to them to be sound reasons. Look at it from their point of view, and if it is all possible, try to give them some or all of what they want. Avoid arguing with them, don't try to persuade them with your superior reasoning, and instead, just say "yes" whenever you can.

The same exception that applies to Insight 9 above (Let go of control) applies to this one. Say "yes" to requests for new communities only if they answer "no" to question 1 and "yes" to questions 2-5 shown below:

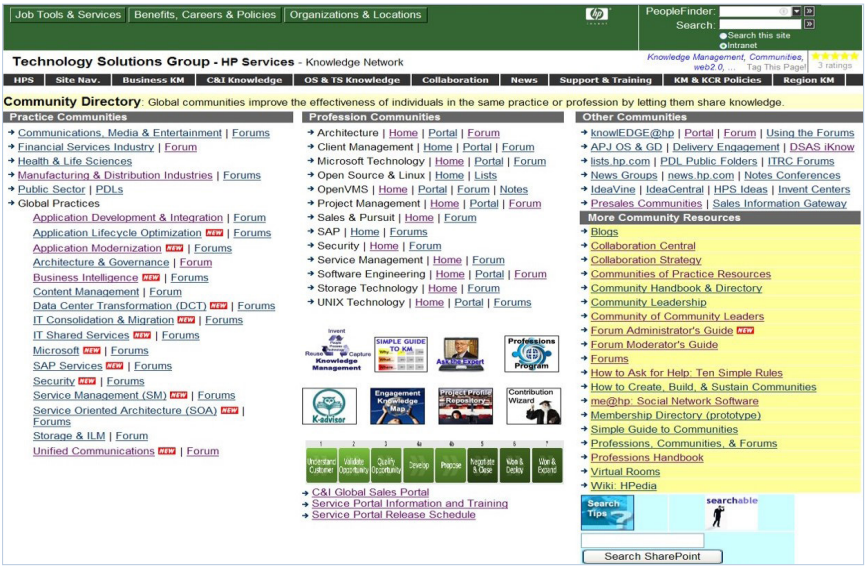
Prototyping and piloting allow you to test out suggestions, gain experience, and make iterative refinements. Instead of telling people who ask for improvements that they will be added to a list for possible inclusion in a far-off future release, try making small incremental improvements based on all reasonable suggestions. Users will benefit immediately from the changes, and they will perceive your team as being dynamic and responsive instead of slow and plodding.

Examples of just saying "yes"

At HP, I distributed a monthly KM newsletter (as a Word document) via email, and also posted each issue to the intranet. I received a request to add an RSS feed. My first reaction was that it would be difficult because the subscription service and the intranet did not offer RSS feeds. I was about to say "no" when I thought about another idea. In addition to posting the Word file, I could copy and paste it into a blog post, and this would generate

an RSS feed. I did do, and not only was the requester pleased, but I now had another distribution channel through the HP blog aggregator that increased the reach of the newsletter.

When I led the global KM program at HP, the European KM leaders held a meeting that I was unable to attend. At the end, they were gathered in a conference room, and called me to debrief me on the results. The regional KM lead used the occasion to repeat a request she had previously made to me to add the Contribution Wizard icon to the Community Directory. I had explained that this made no sense, as contributing documents (the purpose of the Contribution Wizard) had nothing to do with finding a community to join (the purpose of the Community Directory). I was about to repeat this, when I had an epiphany: this must really be important to the people in Europe. So instead of saying "no" again, I told them to hold on. I edited the intranet page to make the change and told them to refresh the page they were displaying in the conference room. I then heard loud applause erupt, and this really proved to me the value of just saying "yes." I have told this story to software providers, pleading with them to at least implement one suggestion from the user community. Unfortunately, this seldom happens, as vendors believe that they know better than their customers who are actually using the software to run their organizations.



HP's Contribution Wizard

When a new senior vice president took over HP Consulting & Integration, she formed an advisory council of practitioners. They provided lots of criticisms of the KM program, which she passed along to me. I was about to defensively respond, but I caught myself, and instead, talked individually with each of the critics. The most vocal of these complained that the user interface to the HP Knowledge Network was too complicated. We had already developed an adaptation of the home page that we called the Engagement Knowledge Map, of which we were quite proud. But taking the criticism to heart, we further simplified it into the Simple Guide to KM (see Insight 5 above). This turned the critic into an enthusiastic supporter and helped reverse the negative perception.

Whenever we planned to introduce a new process or tool, we used the knowledge@hp KM community to help set priorities, make tradeoffs, and critique our plans. When the initial and subsequent versions were released, we used it to request feedback and suggested improvements. This resulted in greater acceptance and use than if we did this in a vacuum.

10 Things You Can Try Right Now Based on These Insights

1. Post to a community or ESN threaded discussion with a link to a document in a content repository that you contributed or reused.
2. Implement an idea you have been thinking about trying out.
3. Answer a question in a community.
4. Praise or thank a contributor of content you used.
5. Solicit stories of how reusing knowledge resulted in a business benefit.
6. Connect two groups working on the same challenge or opportunity.
7. Invite people from three different organizations to join a single community of practice.
8. Take a question sent to you and post it to a community or ESN threaded discussion.
9. Ask someone outside your organization to present on a community call.
10. Solicit suggested enhancements to an existing process or system and quickly implement one or more.

Chapter 14: 10 KM Program Priorities

When starting a KM initiative, there is a lot to consider. Here are ten priorities to ensure a new program takes off as planned.

1. **Put a strong KM leader in place** and ensure that the KM team has only strong members.

Your KM program will only be as strong as the people leading it. Make sure that you appoint leaders who are respected in the organization, are flexible and adaptable, are dynamic and assertive, are eager to be of help to users, and who have strong communication and project management skills.

Avoid people who are available because they have no current role, who project negative attitudes, or who don't work collaboratively. KM teams are usually small, and having one weak link in a small team can cause the KM program to fail. Choose team members carefully, and recruit only the very best people.

2. **Balance people, process, and technology components**, with a project leader for each category.

Don't let any one category dominate the other two. A typical challenge is to avoid immediately diving into choosing and implementing technology. Technology is important, but it must support people and processes, not the other way around.

Assign project leaders for each category who are acknowledged experts in that area, who have successfully led other projects, and who work well together. They can serve as advocates for their categories but should recognize and support the importance of the other categories.

3. **Establish a governance and collaboration process** to engage all groups within the organization (e.g., business units, regions, functions), and to formally manage and communicate on all projects – appoint KM leaders in each major group.

By engaging all constituent groups in your organization, you will ensure that the KM program is not isolated from its users. Employees should view knowledge management as something for which everyone is responsible, not just the domain of the KM team.

KM leaders from each group should continue to directly report to their current groups but become part of a virtual KM team. Ideally, they should feel equally devoted to their home groups and to the virtual KM team.

The KM leaders have a very important two-way role. They represent the needs of their groups to the KM team, and they communicate the direction of the KM program to their groups. They are champions of their groups to the KM team, and they are champions of KM to their groups.

The central KM staff should view the virtual KM team as the decision-making body. It is very important to keep all members informed on current developments and future plans. Avoid an "us versus them" mentality at all costs.

4. **Hold annual worldwide face-to-face meetings** to get all KM leaders informed, energized, and collaborating.

Although it is usually challenging to get approval for large meetings involving significant travel costs, it is nonetheless critical to do so. As soon as you have appointed a critical mass of KM leaders, start planning your first meeting.

Of course, you are not meeting for the sake of meeting. You need to meet in person to establish trust between team members; communicate the vision, mission, expectations, roles, and plans; solicit feedback and inputs; and provide the environment for team members to collaborate.

Plan the meeting carefully. Avoid an endless parade of talking heads and boring presentations. Instead, include workshops, birds-of-a-feather sessions, interactive discussions, and storytelling. Build in plenty of time for small group meetings, networking, and conversations.

Invite the senior executive sponsor to attend all or part of the meeting to present, answer questions, and mingle with the attendees. Invite an outside speaker on an important topic. Give all participants a book and ask them to read it and discuss it in a threaded discussion after they return from the meeting.

By the end of the meeting, everyone should know the direction they should take, believe that their voices were heard, and feel motivated to charge ahead. They will be more effective in collaborating virtually with one another over the course of the next year. And they will be able to visualize the faces of their peers when talking to them on the phone.

5. **Communicate regularly** through newsletters, training, websites, and local events.

Publishing the implementation plan is just the start of the requirement to communicate on an ongoing basis. Develop a schedule of regular newsletters, training courses, and events.

Create websites and be sure to keep them updated regularly. Regularly solicit success stories and publish them in multiple

places. Send KM metrics reports to the senior leadership team and ask that all groups publish their own variations. Make it easy for users to ask questions and publish the answers for all to see.

6. **Get senior leaders to actively support the program**.

You need the support of senior leadership for the KM program. Regularly follow up to keep leaders informed and to help them participate directly in the key activities supported by the program.

7. **Engage with other KM programs**, both internal and external, to learn, share ideas, and practice what you preach.

Learning about the field of knowledge management is not a one-time only action. Rather, it is an ongoing requirement to ensure that you take advantage of what others in your field have already learned, succeeded with, and failed with.

If there are other KM programs within your organization, contact their leaders to find out the details of their efforts. If there is an internal KM community, join it and actively participate. If no such community exists, talk to your peers about creating one, and take the lead, if necessary, in getting one off the ground.

Join an online KM community and participate in its discussions and calls. Join a local KM community to meet in person, or create one if not already available in your location.

8. **Focus on delivering tangible business benefits** that match the overall objectives of the organization.

The KM program only exists to produce useful results for your business. Keep reminding all KM leaders and participants of this.

When publishing success stories, be sure to mention the business impact. When communicating, tie all proposed plans to the expected benefits.

9. **Deliver regular improvements** to make the KM environment effective and easy to use.

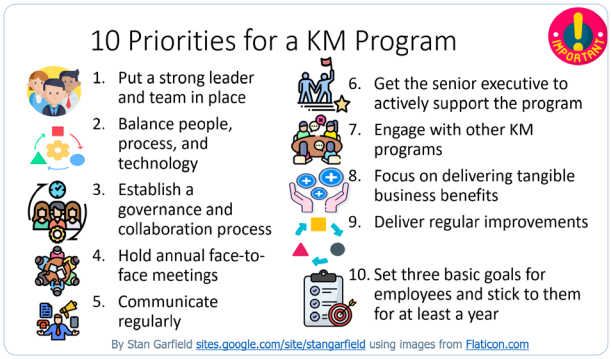
Once the selected people, process, and technology components are in use and achieving results, figure out how to improve them and add to them to yield even more value. User surveys, KM team meetings, external reading and conferences, and your own inspiration are all excellent sources of ideas for enhancements and new capabilities.

When you get a good idea, present it to your KM team, and if they like it, quickly prototype it. If the prototype is successful, proceed to a pilot so you can make improvements, learn from experience, and plan a full roll-out.

10. **Set three basic goals for employees** and stick to them for at least a year.

Avoid establishing a long list of arcane metrics. Instead, pick three simple goals that are easy to articulate, implement, and measure.

Make these three goals the pillars of your ongoing communications so that everyone will remember them. Set overall targets for the organization and key all metric reports to show progress against these goals.



Chapter 15: 15 KM Issues

Sustaining success in a knowledge management program requires recognizing and dealing with many challenges. Here are fifteen issues likely to arise as you implement KM, and how you can address them.

1. Getting senior leaders to provide funding, demonstrate support, and lead by example.

- *Challenges:* Leaders give lip service to KM. For example, they may advocate usage of an Enterprise Social Network, but then continue sending email. They say, "You should fill in your own profile," but they have someone else fill in theirs. Instead of using a KM tool, they delegate it to someone else. They want a KM program but fail to allocate budget and resources for it.
- *Solution:* Ask the senior executive to agree to The Ten Commitments and to post, reply, and praise in online communities. See Chapter 3 for details.

2. Balancing people, process, and technology components.

- *Challenges:* Immediately diving into choosing and implementing technology. Fixating on rolling out tools and driving adoption.
- *Solution:* Don't let any one category dominate the other two. Technology is important, but it must support people and processes, not be an end in itself. Start with the needs of the organization, not with finding a use for a tool you have already bought.

3. Delivering tangible business benefits that support organizational objectives and priorities.

- *Challenges:* Knowledge management is disconnected from the overall goals of the business. It is not viewed as delivering value to the business.
- *Solution:* Directly align KM goals with business goals. Communicate the value of KM (see Chapter 22 for details).

4. Motivating people to share, innovate, reuse, collaborate, and learn.

- *Challenges:* People say that they don't have time, don't know what is expected of them, or that leaders don't expect them to actually perform KM tasks.
- *Solution*: Motivate people through goals and measurements, recognition and rewards, gamification and badging, and positive and negative incentives. Leaders should set and communicate goals, report on progress, inspect and enforce compliance, and deliver rewards and recognition for those who set the example. See Chapter 21 for details.

5. Establishing a vision for how knowledge management should work, and relentlessly working towards making that vision a reality.

- *Challenges:* The end state is not defined, not compelling, or poorly communicated. It's not clear to people why KM is needed or how it is supposed to work.
- *Solution:* Communicate a clear vision for how KM will work. Then continuously implement, improve, and iterate people, process, and technology components to achieve the vision. See Chapter 5 for details.

6. Defining compelling use cases clearly showing the advantages over existing alternatives, and answering the question "what's in it for me?"

- *Challenges:* The wish for everyone to participate in KM leads to vague requests like, "We want everyone to start connecting and sharing." If you don't get more specific than that, you don't have a very appealing use case. If you say, "Will you please start collaborating globally?" it doesn't mean anything.
- *Solution:* Ask people to use KM for specific tasks for which it is best suited, such as sharing, asking, finding, answering, recognizing, informing, and suggesting. Interact on specific use cases and talk about how the tool that you're recommending actually achieves better results. See Chapter 7 for details.

7. Getting people to openly ask for help.

- *Challenges:* People are reluctant to ask for help in public, contact people in other organizations, or say the wrong thing. They would rather suffer in silence than expose their ignorance to the world, or to be criticized, blamed, or ridiculed.
- *Solution:* Facilitate ways for people to establish trusting relationships in communities so that they will better know those whom they will be asking for help. Make it easy to figure out where to post a question by having a list of communities, easy-to-use search, and a single obvious community for each important topic. Provide ways to ask questions on behalf of others, including anonymous ask the expert tools. Redirect queries you receive to the appropriate communities and ask others who frequently receive queries to do the same.

8. Making useful information easily findable.

- *Challenges:* People can't find information, resources, or experts they need to do their job. Search doesn't work, and even when it does, the content is incomplete, obsolete, or irrelevant.
- *Solution:* Add a "I found this useful" button, similar to a "Like" button, but more specific, to all content; encourage users to click on this button for content they were able to reuse. Allow content to be tagged with "proven practice" by an authoritative source. Allow searching by date, tag

attribute, most-liked by users, etc., and make content with the most tags, "I found this useful" clicks, tagged with "proven practice" by an authoritative source rise to the top of search results. Determine the topics of greatest importance to the organization, curate a list which can be searched and filtered, and feed these as enterprise search best bets with links to the content deemed to be the best for each of these key topics. Take steps to improve search results.

9. Connecting people to each other so they can help each other at the time of need.

- *Challenges:* KM programs focus on getting people to submit forms, contribute documents, or update skills profiles. This proves difficult to accomplish.
- *Solutions:* Letting documents and expertise emerge at the time of need is a better approach. This is best done in a community of practice. If you need to find a document, or an expert, post to the most relevant communities with your request. If your communities are working as expected, you will receive one or more replies and can proceed. Documents and expertise will emerge in the replies to the query. By reading the full thread, you will get a sense of the context for the offered documents, assess different points of view, see points and counterpoints, and be able to synthesize multiple documents and what multiple people think.

10. Improving decisions, actions, and learning.

- *Challenges:* KM programs are described using vague concepts like "increase engagement," "add value," or "drive transformational change." These are difficult to measure and achieve.
- *Solution:* Tie KM efforts directly to key business processes. Develop goals and metrics to demonstrate progress in helping people make better decisions, act more effectively, and learn from others.

11. Focusing on a few initiatives, setting a few simple goals, and not trying to tackle everything possible.

- *Challenges:* There are 50 KM people, process, and technology components available for implementation (see Chapter 10). It can be tempting to try all of them. It's hard to resist the allure of the latest technology, the current fad, or the tool that sounds too good to be true. Organizations tend to establish long lists of arcane metrics.
- *Solution:* Choose a few KM components that will yield the greatest benefits in the short term to your organization. Stick with proven approaches, even if they seem boring and predictable. Key all metrics reports to show progress toward achieving the Top 3 Objectives.

12. Delivering what people want and the organization needs, not what is trendy.

- *Challenges:* Organizations can be mesmerized by maturity models, benchmarking, and me-too best practices.
- *Solution:* Stick to your vision, the Top 3 Objectives and the results of surveys to help set priorities. Monitor new developments for possible implementation, but only do so when it makes sense.

13. Communicating by pull and opt-in, not by push

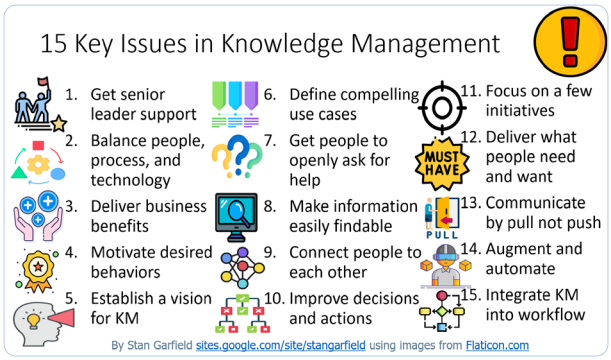
- Challenges: Organizations want to push information out to audiences. Leaders regularly send lengthy email messages and newsletters to people who don't read them.
- Solution: Make it attractive for people to pull content for themselves. Provide opt-in for subscribing and unsubscribing from content. Enable direct interaction with leaders to replace communiques filled with corporate speak and jargon.

14. Augmenting and automating processes using analytics, artificial intelligence, and related techniques.

- *Challenges:* New KM technologies are introduced, hyped, and implemented. But they often fail to deliver on their promise.
- *Solution:* Before pursuing new technologies, define use cases that clearly specify how they will deliver significant improvements to the status quo. Analytics and business intelligence can enable making good decisions, acting efficiently, optimizing processes, inventing and innovating, communicating effectively, influencing customer buying, and improving business performance. Compelling use cases for AI are still being developed. For some suggestions, see Chapter 17.

15. Integrating knowledge management into existing processes, workflows, and systems.

- *Challenges:* KM is perceived as extra work. It requires additional tools that people have to learn and use.
- *Solution:* Embed knowledge capture in the flow of work, not as a separate process. Make tools and systems work together to minimize the need for separate tools. Look for ways to automate existing processes to reduce required effort and improve the quality of results.



Chapter 16: 10 KM Lessons Learned

I learned these lessons over 30 years of sharing my thinking, innovating new approaches, reusing the proven practices of others, collaborating in communities, and learning by doing, reading, and attending events. Reuse the ones that best fit your situation.

1. Prima donnas – be vigilant, coach privately, stand up to them.

In communities, KM programs, and organizations in general, the majority of people I have encountered are decent folks. But every so often a prima donna appears, and when they do, you need to be ready to counteract their negative impact. Here are examples I have seen:

- **Loudmouth**
  - *Situation:* A post in the community - "My opinion is that it was so ponderous, so turgid and overweight, with practitioners so lofty, rare and insular, that it was simply crushed by its own mountainous hubris."
  - *Nugget*: Suggest using a slightly less pretentious tone the next time.
- **Blowhard**
- *Situation:* A post in the community - "Does this mean that KM means taking 'advantage of what people know'? If so, he has a vastly mistaken impression."
- *Nugget:* Send a private message with a suggestion to use a more positive tone in future posts.
- **Bully**
  - *Situation:* A statement from the supervisor - "I have taken over control. Now you will do things my way, or you will be considered insubordinate."
  - *Nugget:* If your KM program is moved under a bully, you have two choices. Wait for another change in reporting structure or move on to work for someone else.
- **Braggart**
  - *Situation:* A statement from a team member - "I am passionate about KM. Therefore, I should be put in charge of it."
  - *Nugget:* Demonstrate that skill, experience, and expertise are also needed to lead a KM program. Include the braggart in your efforts and call their bluff by asking them to produce actual deliverables by a set deadline.
- **Egomaniac**
  - *Situation*: A post in the community - "I am just shaking my head. You know so very little about what is going on outside your little spaces."
  - *Nugget*: Thank them for their participation and offer examples of more effective ways to communicate.

2. Point/counterpoint – ask for feedback in the open, be respectful, maintain civility.

- **Opposing view**
  - *Situation:* When I wrote the Communities Manifesto, I solicited comments on the early versions. Most were very helpful, and I incorporated as many as possible in the final version. A few people disagreed with some or all of the ten principles I defined. When I asked them to elaborate on their positions, they didn't provide any further details.
  - *Nugget:* Request feedback from as many people as possible and apply it as best you can. If people attack your position, listen with an open mind, but insist that they back up their criticisms.
- **Certification wars**
  - *Situation:* The subject of KM certification is controversial and has sparked online flame wars between proponents and critics, and between competing certification providers.
  - *Nugget:* Arguing and making threats is unlikely to help your cause. Disagree respectfully or keep quiet.
- **Monopolizing the discussion**
  - *Situation:* Communities have different cultures – some more welcoming, and some more intimidating. In one formerly active KM community, discussions were often about fundamental principles, abstract concepts, and theory. There were frequent back-and-forth exchanges between the same few people, often quoting each other to debunk opposing views. In this situation, others may be afraid to post due to the possibility of challenging responses, or because they lack the same rigor and fervor as the dominant posters.
  - *Nugget:* Monitor discussions and suggest to those who tend to post the most, that they take periodic breaks to allow others to have their say.
- **Piling on**
  - *Situation:* For seven years, the Association of Knowledgework (AOK) Star Series Dialogues provided finite, moderated discussions that were lively and stimulating. There were some very knowledgeable and opinionated members, who were not shy about voicing their views in a spirited fashion. The community held regular online dialogues led by guest hosts during which a predefined set of topics were discussed for a week. This was an innovative and successful approach, but it also required guest hosts to hold their own during their stints when the opinionated members weighed in. During a few of these dialogues, the guest hosts struggled. In one case, the host just

stopped responding, unwilling to stand in there and keep replying to the challenging posts.
    - *Nugget:* If you are leading a conversation, presenting, or posting in an online discussion, be prepared for challenging replies. Don't take them personally; acknowledge shortcomings and difficulties, listen actively, and do the best you can. A good sense of humor also helps.

- **Transparency**
    - *Situation*: When it was my turn to host the AOK Star Series Dialogue, the following exchange stood out:
        - John Doe> Agree wholeheartedly empowering people with the 3 Ts is the key – Truth, Trust and Transparency – but transparency needs to be driven from Board level and we need to do all simultaneously.
        - Me> Thanks for your many insights. I especially like the one on the 3 Ts. One example of transparency is Open-Book Management which I recall debating with managers at Digital in the past. This also relates to the open/closed tradeoff – how open are you willing to be with your employees? I prefer to be as open as possible, but other managers are at the other end of the spectrum, worrying about exposing too much information, and not trusting employees to treat confidential information as such.
        - John Doe> The 3 Ts have very little to do with "open book" – the 3 Ts are about getting the job done using 100% of brain power to prevent rework of any type – increase productivity by 100% through connectivity and empowerment – effectiveness and efficiency at the ALARP level of risk is the objective. Financials are no part of the 3 Ts but the outcome of the 3 Ts ensures that the company can shut the book on the competition.
        - Peter Marshall> I've been too busy to participate in this discussion, which is killing me, because Stan has provided a great perspective, great information, and raised some issues on which I have strong opinions. But I could not pass up this headline – my experience with transparency. My OWN experience is quite different. At first, I didn't like it at all, because people wouldn't talk to me. I would walk right up to them, and they would act like I wasn't there! Then when I tried to enter the conversation, they would look all scared, and look around quickly, and back away. "Weirded out" is probably the best way to describe their reactions. But then it got to be fun. I could "manage by walking around" a lot more effectively, because I got to see how people were REALLY acting, how they handled things, what kinds of issues and problems they were facing, etc. Before my transparency, people would get all "politically correct" when I walked up – handling things, being mature and effective, sharing knowledge, and so on. But once I got transparent, I saw that people were anything but effective – emailing their friends about their Nordstrom shirts, taking long lunches with lobbyists, gaming the systems, withholding knowledge so that they could step in later and save the day, or get higher commissions than their colleagues. I really recommend it, especially for folks that tend to "believe their own BS" :-) – transparency is very revealing.
        - John Doe> Peter nice to hear your experience with Transparency – you described success in two properties of transparency – people and action. You changed your culture - now others can follow – it's a great feeling to be innovative and successful at it. Now comes the point of entrepreneurship to make it happen elsewhere. So far, I have identified 8 properties of transparency – for which I am working on a provisional patent. The application of the 8 properties of transparency is organizational leadership and organizational competence – most organizations are full of competent people – yet they have catastrophic failures – designing transparency as a systemic management tool is the challenge – but will not happen unless a transparent change management system is in place that deals with business judgments. Hence the DEC and many other catastrophic business failures.
        - Me> "I really recommend it, especially for folks that tend to 'believe their own BS'" – Peter, your post made my day. You are a master of irony!
    - *Nugget:* When dealing with pompous, pretentious pontification, exploit your sense of humor.
- **The Jerk Store Called**
    - *Situation:* My post about the DIKW pyramid scheme generated a lot of interest, including many comments.
        - Johnny Doe> Do you have a particular point??
        - Me> Read the full article and the articles linked to in it.
        - Johnny Doe> No.... State the point or intent, and then I will decide to read or not. It is not a good approach to read on blind faith."
    - *Nugget:* After one civil reply, don't waste any further time or emotions responding to jerks.

3. Ask not, get not – redirect queries, use email to link to discussions, don't reply to all

- **Reluctance**
    - *Situation*: People are reluctant to openly ask questions or request help. They prefer to ask the person sitting in the next cube, contact a trusted colleague via text, or send an email to one to several people they think may be able to assist. They won't post to a community or an Enterprise Social Network, even when this is suggested as the most effective way.
    - *Nuggets*
        - I regularly receive email, LinkedIn messages, and other private communications posing questions about knowledge management. I usually reply with a suggestion to post in the SIKM Leaders Community and that I will be glad to answer there. If they do, I always try to reply and encourage others to do the

same. But frequently they don't follow up with a post, in which case, their reluctance prevents them from receiving the very help they originally sought.
    - You can forward queries to communities or post them in an ESN on behalf of the requester. If after the request has been posted, there are no suitable answers, you can send email or private ESN messages to people who may be able to help, with links to the post, and a request to reply in the community or ESN.
- **Email Wars**
    - *Situation:* One time when people are NOT reluctant to speak up is when they receive an email message sent out to a large distribution list that they don't believe they should have received. In this case, ever-increasing numbers of people will reply "take me off this list!" or "stop replying to all!"
    - *Nugget:* The way to stop such an email storm is to NOT reply to all. If everyone just deletes the annoying email, it will quickly be forgotten.

4. Sounds of silence – plant questions, allow questions via text, allow asking anonymously

- *Situations*:
    - A similar problem is people who won't speak up. This includes people who join communities but don't pay attention to the community's discussions or attend any of the calls. These join-only members may as well not have joined, as they get nothing out of being a member.
    - Those who don't post, reply, or speak up on calls can still get value from community membership. Often derided as "lurkers," they are merely part of the 90% of members who aren't active. But as long as they pay attention, this is to be expected, and there is no problem with it.
    - Passive attendance is the norm on most calls. If you ask, "are there any questions?" you are typically met with silence. If you try to remedy that by calling on participants by name, you may trigger a mass exodus as they drop off to avoid having to speak up.
- *Nuggets* for overcoming silence:
    - **Plant questions** – ask a few people before the call to speak up when you open the floor for questions.
    - **Allow questions via text** – use group chat or an ESN to give those who prefer typing to speaking a way to ask their questions.
    - **Allow asking anonymously** – you can either post on behalf of people who don't want their name to be visible or provide an anonymous chat line for this purpose.

5. Don't try this at home – make it easy for leaders to use the tools, spend 10 minutes each week, lend a hand

- *Situation:* Leaders frequently want people to do as they say, not as they do. Not practicing what you preach sets a bad example. People will closely observe the actions of leaders and mimic them. If the people in charge fail to lead by example and model desired behaviors, it is unlikely that others will do what is being suggested. Here are cases of failing to lead by example:
    - Leaders who endorse tools but don't use them. For example, they tell everyone to fill in their expertise profile, but they don't do this for themselves.
    - Leaders who continue sending email instead of posting in the ESN. They launch the ESN with much fanfare, and may even post on it during the rollout, but then they no longer do so.
    - Leaders who talk about social media, but don't try it. They don't post in Bluesky or LinkedIn or accept LinkedIn invitations. But they fund social media strategies and campaigns without any first-hand understanding of how the tools actually work.
    - Leaders who use communications people or other staffers to ghost blog, post to the ESN, or use KM systems. People can tell that they are not actually doing these things themselves, and they lose the chance to set a good example and speak in their authentic voice.
    - I worked on the merger of Compaq and HP. Both companies had knowledge management programs that included communities of practice. I suggested that communities could really help the combined company get off to a strong start by establishing connections on day 1 between people with similar specialties and roles in the two pre-merger companies. This was not done, and a great opportunity was missed. Employees continued to think of themselves as pre-merger Compaq or HP, rather than members of the new HP. Communities would have helped break down barriers by spanning boundaries and building on what people had in common, not what was different.
- *Nuggets* for helping leaders to lead by example in knowledge management:
    - **Make it easy for leaders to use the tools**. Give them intuitive user interfaces, provide multiple ways to access systems, embed KM into existing processes, and keep things as simple as possible.
    - **Spend ten minutes each week with leaders** to guide them on what to do. For example, review ESN posts, and have them like some, reply to others, and initiate a new discussion of their own.
    - **Lend a hand**. Regularly make yourself available to answer questions. Send emails to leaders to which they can just reply to respond to an ESN post, or that include obvious links for them to click on to take some desired action. Guide them on how to use tools, sitting with them as they do so.

6. You're out! – uphold your principles, warn and give one more chance, don't put off making hard moves

- *Situations*
    - **Figurehead: not!** – I was asked to be the co-leader of developing a corporate knowledge management strategy for Compaq. This was intended to be a figurehead role, with the actual work being done by a

Big Four consulting firm. Instead, I insisted that the firm be replaced, because the only person who actually knew anything about KM was leaving the firm. We engaged APQC instead, also located in Houston, and with much more experience on KM engagements. And I provided much of the expertise, which was not expected.

- **What goes around, comes around** – I was later replaced as Compaq's systems integration KM leader with an arrogant outsider. I left the company and joined HP as Americas KM leader. Imagine my surprise when I learned that HP was acquiring Compaq. My replacement at Compaq was selected to run the combined KM program, despite the fact that the HP incumbent was much better suited to this role. As Americas KM leader, I was once again accountable to the person who had replaced me. I was respectful but demanding. Two years later, I was asked to replace him. Patience, professionalism, and competence eventually won out.
- **The weakest link** – When I took over the HP KM program, one of my former peers as regional KM leader now reported to me. He had always been quite talkative, but I had not paid a lot of attention to his actual performance. It turned out that he was ill-suited to the role, and his ineffectiveness reflected poorly on the overall reputation of our small KM team. I spent a lot of time in individual coaching, but it became clear that he would be unable to meet the expectations of his job. I made the difficult decision to remove him and seek a replacement. I then pursued a highly respected project manager who had left the KM team when the previous KM leader alienated many of the HP incumbents. My manager was skeptical that I would be able to get him to return, but I did. It turned around the perception of our team and program and was one of the best moves that I made.
- **Removing community members** – I rarely need to intervene on posts in the SIKM Leaders Community. This must be done carefully – removing members can have very negative consequences. Another KM community was once very active, but no longer exists. It was fully moderated – all posts had to go through the community manager, who edited each one before it was posted. When the community manager refused to post one member's contribution, this led to an uproar. He then removed another vocal member, which in turn led several respected members to leave. This led to the eventual demise of the once-lively community.

- *Nuggets:*
  - **Uphold your principles.** Don't give in to political pressures. Do what is right. Even if you have short-term difficulties, you will be proved right in the long run.
  - **Warn and give one more chance.** If community members behave badly, privately let them know what they did wrong, and what the expected behavior is. If they continue to violate community norms, remove them.
  - **Don't put off making hard moves.** If you have a poor performer, coach them and provide personal assistance. If they still can't meet expectations, replace them with someone who can.

7. Fear factor – patience, persistence, perseverance

Many people are afraid of failure, blame, criticism, being judged, embarrassment, change, standing out, the unknown, taking the first step, losing control, or being responsible. Common fears include:

- **Fear of openness, transparency, and trust**
  - *Situation:* Many leaders prefer secrecy to transparency. They prefer that as few people as possible know what they are up to. This can be caused by a lack of trust, and it results in an environment where people are reluctant to share.
  - ***Nugget***: Trust others until they give you reason not to.
- **Criticism, blame, second-guessing**
  - *Situation:* Anxiety over these can lead to analysis paralysis, and a reluctance to decide or act.
  - *Nugget:* The culture of the organization should encourage and celebrate those who take prudent risks, learn from failures, and support one another. Ask your senior leaders to declare that they will eliminate criticism, blame, and ridicule in all interactions with others, and that they expect everyone else to do the same.
- **Social media risk and blocking access**
  - *Situation:* Some organizations are afraid that confidential information will be leaked through social media, and as a result, they try to block access to social media platforms. If someone is determined to leak information, they will find a way to do so, including using a personal device on a home network that is not blocked, or using email or the telephone.
  - *Nugget:* Trust people to follow the organization's confidentiality policies, and deal with violations if and when they occur. It's actually better to know when leaks occur than to be ignorant of them, so social media is better in that it is transparent.
- **I don't want to look like an idiot**
  - *Situation:* Generally, people don't want to embarrass themselves, and will go out of their way to fade into the woodwork to avoid appearing ignorant or wrong.
  - *Nugget:* Praise, recognize, and reward those who are bold enough to post, reply, and speak. And get senior leaders to do this regularly. This will set the tone that rather than shame, positive things will result from overcoming the fear of looking bad.
- **Avoiding something new**
  - *Situation:* Whenever an innovative approach is proposed, it will encounter resistance from those who are afraid that it might not work. An example is when I proposed using a BarCamp for an all-hands meeting. The meeting planner was reluctant to try a different method, even though it sounded good, because it had not previously been used.

- *Nugget:* I spent a lot of time reassuring him that I would personally make sure that the new approach would succeed. Patience, persistence, and perseverance paid off in the end.

8. Location, location, location – meet face-to-face periodically, allow people to work from where they prefer, inform colleagues in cities you will visit of your plans

- **Cancel the meeting!**
  - *Situation:* Periodic face-to-face meetings are needed for teams and organizations to establish and maintain trusting relationships. But those who wish to plan and hold such meetings frequently are asked, "can't you just use a videoconference?" in order to avoid the costs. The irony is that the same senior leaders who don't want the expense of others holding meetings will often hold frequent, low-value, in-person meetings for their leadership teams. When I was leading global KM teams, twice I was forced to cancel meetings that had already been planned. In one case, all of the expenses had already been incurred, so the cancellation did not save much money. It was done merely for the sake of appearances.
  - *Nugget*: Secure approval and funding for annual face-to-face meetings in advance. Work hard to prevent it from being cut. Plan and hold effective meetings that increase trust, enlighten and motivate attendees, and deliver positive results.
- I've Been Moved!
  - *Situation:* Some companies resist working from home or working in locations that are remote from the main office. The global pandemic led to a huge increase in working from home. But now some organizations are insisting that workers return to the office.
    - It used to be the rule that when you accepted a new position in a different location, you would have to relocate there. That's why I moved from St. Louis to Detroit in 1986.
    - Modern modes of virtual work have changed this to where people can now remain where they currently live. But not always. I accepted one new job that required that I move to a different headquarters location. The idea was that there would be more serendipitous interactions if we all worked in the same building. But when I started working there, I noticed that not everyone would attend weekly team meetings in person. They remained at their desks and dialed in, even though the meetings were held just down the hall. The public spaces designed for spontaneous collaboration were not used.
    - I didn't want to move, but I was given until the end of the year to move. I began commuting each week, resulting in stress and anxiety. I found that others were in similar situations, in some cases, living away from their families. No one wanted to move, and as a result, as soon as another job opportunity became available that didn't require relocating, they took it. This was the case for me as well. After three months of commuting, I was offered a position at a different company.
    - This company also wanted me to move and offered me the choice of four hub locations where I would work in the same office with other people in the same organization. I asked them if instead of moving to one of these other cities, if I could remain where I lived, and work in the local office. Because they needed my experience and expertise, they agreed. And later, when I asked permission to work from home, I once again received approval, albeit reluctant. The requirement to work in a hub location, or at least to work in a local office, was supposedly based on the benefits of working in close proximity to others. But in reality, it was based on a lack of trust, and the obsolete belief that workers should all be visible to the boss so that they would not slack off.
  - *Nugget:* Workers can be more productive if they are allowed to reside in a location in which they prefer to live, and if they are allowed to work from home. They will have higher morale, spend more time working, waste less time commuting, and avoid unnecessary distractions and interruptions at the office. The company that insisted that I move to a headquarters location eventually gave up on that idea, and that organization was disbanded.
- **Laptops down!**
  - *Situation:* Once laptop computers became widely used, face-to-face meetings had to start with the order to "put your laptops down" during the meeting. I once attended an executive team meeting in which all the participants entered the meeting room, set up their laptops, and didn't speak to each other before the meeting started. It occurred to me that if this was the case, they may as well have stayed home and met remotely.
  - *Nugget:* It's important to figure out when to meet in person and how to best take advantage of doing so. When planning and holding meetings, both in-person and virtual, you have to overcome short attention spans, readily available distractions, and the widespread compulsion/addiction to regularly check email and social media. Avoid the same old boring presentations and discussions and come up with more stimulating and dynamic methods and topics.
- **Sorry I missed you!**
  - *Situation:* When traveling, people don't always take advantage of the opportunity to meet colleagues who will be in the same place. They miss out on the chance to establish and strengthen relationships, inform and learn from each other, and make progress on initiatives of mutual interest. Later on, when they become aware that they failed to do so, they may both lament the missed opportunity.
  - *Nugget:* When planning to travel to another location, use LinkedIn to alert your colleagues in that location that you will be there and would be open to meeting with them. Search people by location, and then send a

LinkedIn message to all whom you would like to see. Or post on a social media platform or ESN informing about your travel plans. This may result in people replying that they would like to connect while you are there. This is an example of Working Out Loud. If anyone replies to show interest, take them up on it and schedule a time to get together.

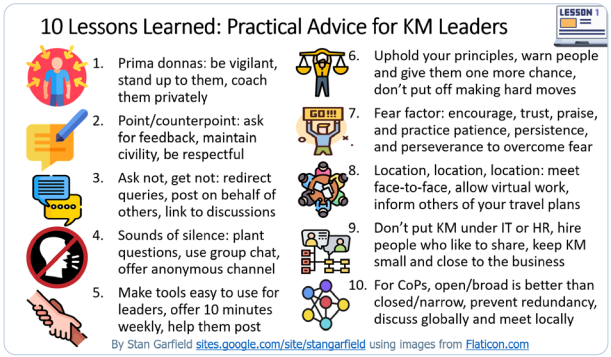
9. Hot potato – put KM under a neutral organization, hire people who actually like sharing, keep KM small and close to the business

- **Meet the new boss**
  - *Situation:* The KM team is often moved from group to group, never finding a permanent home. In my career, I frequently was put under a different organization or a new leader. Many posts in KM communities have asked "Where does KM belong?"
  - *Nugget:* Don't put KM under IT, HR, or some other stovepipe. If there is no independent Chief Knowledge Officer who reports to the CEO, then some neutral organization such as Operations is the best place. A virtual team made up of KM champions from each key organization is a good way to balance a central team with distributed representation.
- **Village idiots and weary road warriors**
  - *Situation:* Knowledge management teams are not always staffed with the best and the brightest, or even with people who actually care about KM. In some cases, people who happen to be available because they are not otherwise in demand are offered up as staff members. In others, people who should not be employed are transferred to KM teams to avoid dealing with the unpleasant tasks of counseling them out or firing them. In the case of professional services firms, workers who have had to travel constantly and live out of a suitcase find joining the KM team is a convenient way to come off the road and stay at home. If the members of the KM team do not have a passion for the field, and do not regularly practice it themselves, it's unlikely they will make a big impact on getting others to do so.
  - *Nugget:* Hire people who actually like sharing knowledge, and whose passion for KM is infectious. Avoid people whose primary skill is availability.
- **Lean and mean**
  - *Situation:* KM organizations sometimes try to grow and add staff, believing that the bigger the team, the more important it will be.
  - *Nugget:* Although you need at least one full-time KM leader, you should try to keep the KM team small. The larger it gets, the more it becomes a target for budget cuts. And the more people in the team, the more time they will spend on meetings and coordination and the less time on productive work.

10. Do good fences make good neighbors? – open/broad is better than closed/narrow, prevent redundancy, discuss globally and meet locally

- **Community tradeoffs**
  - *Situation:* Should communities be open or closed, global or local, limited to senior people or not, open to both sales and technical people in the same community?
  - *Nugget:* There should be a clearly stated preference for open, global, and inclusive communities. The value of communities is largely due to the ability of everyone in the organization to benefit from participating in open and easily discoverable discussions. Try to have a smaller number of communities, each with a larger number of members. A single, large community for each important topic, used for collaborating across all organizations and geographies, is more effective than having lots of separate, small communities for each possible subset of the topic, location in the world, or participant role. Having more people increases the likelihood of questions getting answered, useful information being shared, and the organization as a whole learning more about the topic.

- **We need our own, this is different, we want to focus on a narrow niche**
  - *Situation*: People frequently wish to create their own community rather than use an existing one focused on a similar topic. This may prevent either community from achieving critical mass. And it will fragment the knowledge that could have benefited members for both communities.
  - *Nugget*: Try to refocus their energy from starting their own new community into helping lead the existing one. In that case, the best advice is to say, "I'm glad that you're excited to lead this new community. Will you be a co-leader of the existing one? We can really use your energy bringing in your colleagues from the organization you're in." Local chapters can work if they are focused on meeting in person. Don't create separate online spaces for them but encourage them to post about their local events in the larger community's threaded discussions or Enterprise Social Network group, adding tags that are unique for each local chapter.

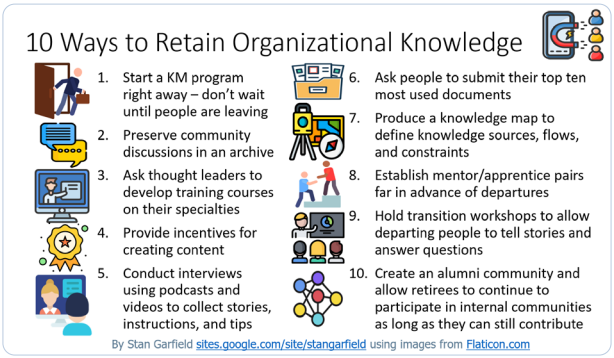


Chapter 17: 10 Knowledge Nuggets

This chapter contains tips, tricks, and techniques that can be applied as part of a knowledge management program. Each nugget is accompanied by a descriptive infographic.

1. 10 Ways to Retain Organizational Knowledge

1. Make sure you have a knowledge management program in place. Don't wait until people are about to retire or depart.
2. Preserve community contributions and community discussion threads in an archive.
3. Ask thought leaders to develop training courses on their specialties.
4. Provide incentives for creating personal guides to processes, contacts, and content.
5. Conduct interviews using videos and community spotlights to collect stories, instructions, and tips.
6. Ask people to submit their top ten most used documents.
7. Produce a knowledge map to define knowledge sources, flows, and constraints.
8. Establish mentor/apprentice pairs as far in advance of departures as possible.
9. Hold transition workshops to allow departing people to tell stories and answer questions.
10. Form a community for former members of the organization and allow retirees to continue to participate in communities as long as they can contribute.



2. 10 Ways to Provide Best Bets for Search

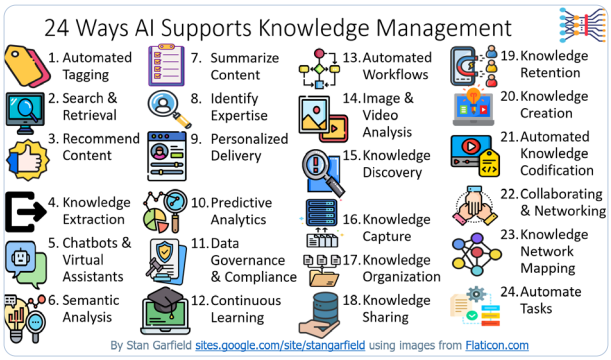
1. Request submissions from content providers but be selective in what you accept – some providers will submit endless lists of best bets, and not all of these will be worthwhile.
2. Match the existing intranet high-level navigation so that for each link in the top navigation and/or breadcrumbs, there is a corresponding quick answer.
3. Ask key contacts for each category what they consider important – these can be organizational leaders, thought leaders, subject matter specialists, community leaders, or knowledge managers.
4. Ask in ESN groups and communities to get the suggestions of members, and also share the proposed quick answers there to get confirmation or changes.
5. Review enterprise search logs for the most searched-for terms and the most clicked-on search results.
6. Review web analytics for the most visited pages and downloaded documents.
7. Review websites and documents that are liked or tagged as useful by users.
8. Ask all help desks to provide the most frequent queries and replies.
9. Review queries posted in the ESN, email messages sent to distribution lists, and requests sent to official mailboxes – look for patterns of missing or hard-to-find content.
10. Review all published FAQs

3. 24 Ways AI Can Support KM

1. **Automated Content Categorization and Tagging**: AI can automatically categorize and tag documents, articles, and other content based on their content, making it easier to organize and retrieve relevant information.
2. **Search and Retrieval**: Advanced search algorithms powered by AI can enable more accurate and efficient information retrieval. Natural language processing (NLP) techniques allow users to search using natural language queries, making it easier to find specific information within a knowledge repository.
3. **Content Recommendation**: AI can analyze user preferences and past interactions to recommend relevant articles, documents, or resources, thus improving knowledge discovery and dissemination.
4. **Knowledge Extraction**: AI can analyze unstructured data sources like text documents, emails, and even audio

recordings to extract valuable insights and knowledge. This can be particularly useful in identifying trends, sentiment analysis, and distilling information from large datasets.

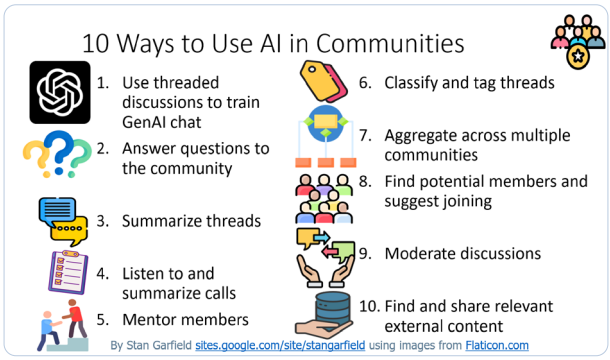
5. **Chatbots and Virtual Assistants**: AI-powered chatbots or virtual assistants can provide instant responses to common queries, guide users through knowledge repositories, and offer real-time support for information retrieval.
6. **Semantic Analysis**: AI can analyze the semantic meaning of content, enabling it to understand relationships between concepts and providing more accurate context-based search results.
7. **Content Summary**: AI can automatically generate concise summaries of lengthy documents, helping users quickly grasp the key points without reading the entire content.
8. **Collaboration and Expertise Location**: AI tools can identify subject matter experts within an organization based on their contributions, interactions, and expertise. This helps facilitate collaboration and knowledge sharing.
9. **Content Personalization**: AI can tailor content recommendations based on individual user roles, preferences, and history, ensuring that users receive information most relevant to their needs.
10. **Predictive Analytics**: AI can analyze historical data to predict future trends, behaviors, and challenges. This can guide decision-making and knowledge management strategies.
11. **Data Governance and Compliance**: AI can help ensure that knowledge management practices adhere to data governance and compliance standards by automatically identifying sensitive or confidential information.
12. **Continuous Learning and Improvement**: AI can learn from user interactions and feedback, continuously improving its ability to provide relevant and accurate knowledge management support.
13. **Automated Workflows**: AI can streamline processes by automating routine tasks such as content updates, version control, and approvals in knowledge management systems.
14. **Image and Video Analysis**: AI techniques can be applied to images and videos, allowing for better organization and retrieval of multimedia knowledge assets.
15. **Knowledge Discovery**: AI can analyze large volumes of data to identify patterns, trends, and insights that would be difficult for humans to uncover. This allows organizations to make better decisions and identify new opportunities.
16. **Knowledge Capture**: AI can listen to conversations, read documents, and analyze interactions to automatically extract important information. This helps capture tribal knowledge that often walks out the door when employees leave.
17. **Knowledge Organization**: AI can categorize and tag information, building knowledge taxonomies and ontologies. This makes it easier for people to find relevant information when needed.
18. **Knowledge Sharing**: Chatbots and virtual assistants powered by AI can provide quick access to information for employees. Additionally, recommendation engines can suggest relevant content to individuals.
19. **Knowledge Retention**: By continually interacting with humans, AI systems can learn and retain organizational knowledge over time. This institutional memory preserves knowledge even as employees come and go.
20. **Knowledge Creation**: AI can combine disparate pieces of information to generate new insights and ideas. This catalyzes innovation and helps create new knowledge.
21. **Knowledge Codification**: AI can be used to automate the process of codifying knowledge from a variety of sources, such as documents, databases, repositories, and other forms of captured information.
22. **Collaborating and Networking**: AI can be used to facilitate collaboration and networking among knowledge workers. This can be done by using chatbots and virtual assistants to answer questions, by using social media to connect with experts, and by using machine learning to identify and recommend potential collaborators.
23. **Knowledge Network Mapping**: AI can create a real-time knowledge network. An organization's entire knowledge network can be mapped out in real time. Employees can quickly identify subject matter experts. The platform learns with every interaction, and the knowledge network becomes more robust.
24. **Task Automation**: AI can automate data entry, document processing, customer support, reporting, scheduling, sending reminders, transcribing meeting notes, and other repetitive tasks.



4. 10 Ways to Use AI in Communities

1. **Train**: Use threaded discussion history to train GenAI chat.
2. **Question Answering**: AI can respond to queries posted in threaded discussions by searching for previous answers and looking outside the community.
3. **Thread Summaries**: AI can summarize threads to extract the key points from lengthy discussions.
4. **Call Summaries**: AI can listen to and summarize community calls for the benefit of those who attended and those who were unable to do so.
5. **Mentoring**: AI can act as a mentor to community members by advising them based on past discussions, calls, and submitted content.
6. **Thread Tagging**: AI can tag threads in a consistent manner and add tags not supplied by those posting.
7. **Aggregation**: AI can monitor activity in multiple communities and aggregate the important content so that it is not missed.

8. **Recruitment**: AI can find potential members and suggest that they join relevant communities.
9. **Moderation**: AI can monitor discussions looking for inappropriate language, inflammatory exchanges, and confidential information that should not be discussed, and act promptly to provide the desired remedy.
10. **Discovery**: AI can find and share relevant external content that members might not otherwise see.

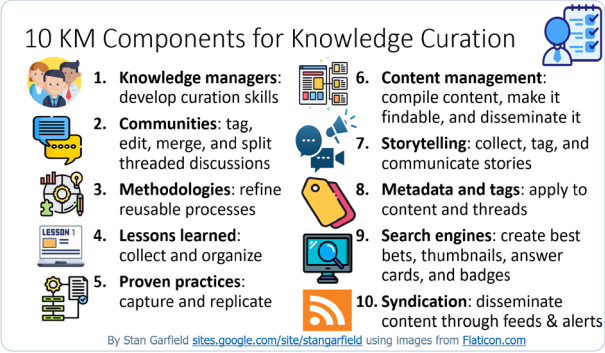


5. 10 Ways to Curate Knowledge

1. **Blog**: Compile useful information, provide original insights, and collect sources from thought leaders.
2. **Wiki**: Edit pages along with others to maintain a communal repository of knowledge.
3. **Search Queries**: Regularly conduct internal and external searches on topics of interest to users and in response to queries. Select the most relevant and valuable results, compile them, and provide them as answers and publish them in posts and as web content.
4. **Search Results**: Beyond organic search results, useful content can be more intentionally provided. To do so, determine the topics of greatest importance to the organization, curate a list of relevant content which can be searched and filtered, and feed the entries as enterprise search results. These can be in the form of curated answers — best bets (thumbnails and links only), authoritatively-badged content, or quick answers (more complete content plus links) for the content deemed to be the best for each of these key topics. They can also be dynamically generated using attributes, tags, sorts, filters, human interaction, etc. Here are ten categories for the curated list of quick answers:
    - Internal organizational structure, e.g., Finance, Human Resources
    - Formal taxonomy: industry or internal, e.g., Global Industry Classification Standard, enterprise taxonomy
    - Products and Services, e.g., Android, Strategy & Operations Consulting
    - Topics, e.g., security, supply chain management
    - Industries, e.g., electronics, pharmaceuticals
    - Clients, e.g., GE, US Government
    - Partners, e.g., Ford, Microsoft
    - Locations, e.g., Latin America, Detroit
    - Specialties and Roles, e.g., project management, information architect
    - Demographics, e.g., new hires, retirees
5. **FAQs**: Tools such as Microsoft SharePoint offer list functionality that can be used for creating, maintaining, and viewing lists of frequently asked questions. Copy answers out of threaded discussions and replies to email queries into FAQ lists that can be easily filtered, sorted, and searched.
6. **Subscriptions**: Subscribe to blogs, newsletters, channels, notifications, and alerts for important updates, and then pass along the most valuable content.
7. **Redirection and Replication**: When email or private chat are used for sharing information and asking questions, redirect these to community threaded discussions by suggesting that the person post or by posting on their behalf. Copy useful community discussion threads into blog posts, FAQs, or documents.
8. **Archives**: For internal content that has been archived due to automatic archiving processes but is still in demand, retrieve it from the archives, restore it to internal repositories, and modify the expiration date so that it will not be archived again. For external content that is no longer accessible on the web, locate it in the Internet Archive Wayback Machine and replace broken links with links to the Internet Archive. To do this, you may need to review multiple captures from different years in order to find specific ones that contain the actual missing content.
9. **Recommendations**: Select the best content and either make that the only content provided or highlight recommended content with special badging or tags or include it in separate lists to differentiate it.
10. **Updates**: Maintain content by removing invalid or obsolete information, testing links to see if they still work and updating them with new ones or with links to the Internet Archive and replacing old versions with new versions.

6.10 KM Components for Knowledge Curation

1. **Knowledge managers**: a skill that knowledge managers need to develop and tasks they should perform
2. **Communities**: community managers tag, edit, merge, and split threaded discussions
3. **Methodologies**: refined reusable processes
4. **Lessons learned**: collected, organized, and communicated
5. **Proven practices**: captured and replicated
6. **Content management**: compiling content, making it findable, and disseminating it
7. **Storytelling**: collected, tagged, and communicated
8. **Metadata and tags**: applied to content and threaded discussions
9. **Search engines**: create best bets, thumbnails, answer cards, and authoritative badges
10. **Syndication, aggregation, and subscription management systems**: disseminate content through feeds, alerts, notifications, email subscriptions, and mobile apps



7. 5 Reasons People Won't Ask Questions and 3 Reasons Why They Should

5 Reasons People Won't Ask Questions

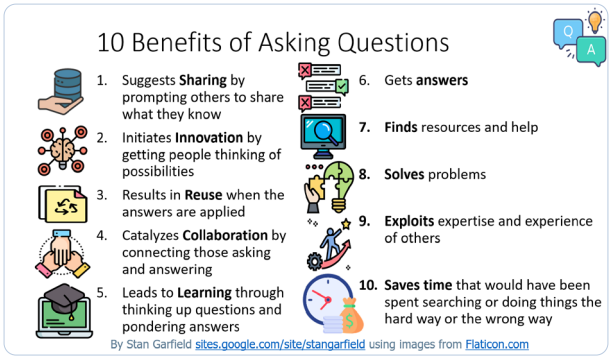
1. I'm embarrassed.
2. I don't want to appear ignorant.
3. I should know the answer.
4. No one else needs to know that I had to ask.
5. I don't want to bother figuring out what to do.

3 Reasons for Asking Openly:

1. It will allow a wide range of answers offered by a variety of respondents, including those previously unknown to the person asking the question.
2. It will allow others to benefit from seeing the question and the answers.
3. It will provide a public record, which can later be searched for, linked to, and reused.

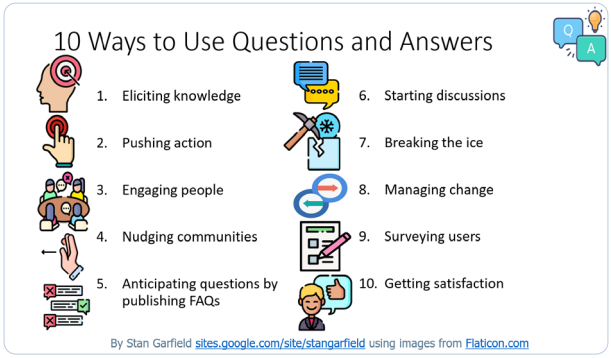
8. 10 Benefits of Asking Questions

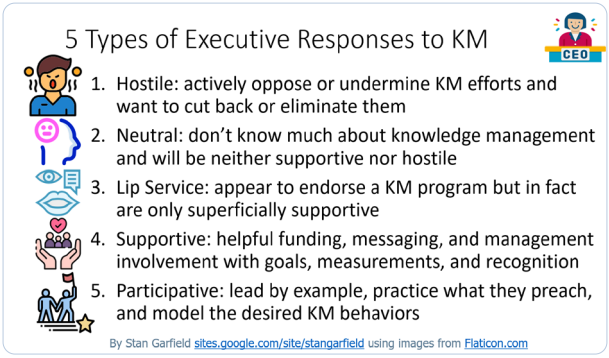
1. **Suggests *Sharing*** by prompting others to share what they know
2. **Initiates *Innovation*** by getting people thinking of possibilities
3. **Results in *Reuse*** when the answers are applied
4. **Catalyzes *Collaboration*** by connecting those asking and answering
5. **Leads to *Learning*** as a result of thinking up the questions and pondering the answers
6. Gets **answers**
7. **Finds** resources and help
8. **Solves** problems
9. **Exploits** expertise and experience of others
10. **Saves time** that would have been spent searching or doing things the hard way or the wrong way



9. 10 Ways to Use Questions and Answers

1. **Eliciting knowledge:** Get knowledge flowing through a series of structured queries. This can be captured for reuse, but it is also valuable in connecting people for future knowledge flow.
2. **Pushing action:** Follow up repeatedly until the desired action is taken. An example is when I asked a friend when he was going to resume blogging after a long hiatus, and he said that my asking might get him to do so.
3. **Engaging people:** Instead of subjecting a team to a long, boring presentation, have the team prepare questions for the would-be presenter and convert the session into an interactive one. Instead of sitting back and multitasking while the presenter drones on, they will have to be on their toes and participate, and the two-way exchange might be more valuable than the one-way presentation.
4. **Nudging communities:** As a community leader, when I see that a question has not received any replies, I reply to it and ask if anyone can respond. This always works, although sometimes I have to nudge more than once.
5. **Anticipating questions:** If the same questions are asked repeatedly, post the answers in a FAQ list, and the next time, just point to the answer in the list. For meetings, to prevent the inevitable question, "Will the slides be made available," distribute them in advance.
6. **Starting discussions:** Ask questions to stimulate discussions in meetings, conferences, Knowledge Cafés, and online.
7. **Breaking the ice:** Use conversation starter questions to help people get to know each other. This can be done at meetings, both virtual and in-person, and in online discussions.
8. **Managing change:** Instead of telling people what is going to change, ask them questions about what changes they would most like to see. Then implement as many of those changes as possible.
9. **Surveying users:** Use surveys to ask questions to identify current challenges and needs, compile a list of resources and their usefulness, and solicit feedback and suggestions. Then take action based on the results.
10. **Getting satisfaction:** Ask for a refund, discount, replacement, or remedial service. You never know what is possible to receive unless you ask.





10. 5 Types of Executive Responses to KM

1. **Hostile:** Some leaders actively oppose or undermine KM efforts. They may have taken over a leadership role and found a KM program already in existence. If they had no role in approving it, they might wish to cut back or eliminate it. This could be because of a previous bad experience, a lack of understanding, or a need to cut costs and show short-term profit improvement. You can try to overcome executive hostility using the techniques in my book Proven Practices for Promoting a Knowledge Management Program, but it may be impossible. If so, you can wait for a new executive to take over or move to another organization that is more supportive.
2. **Neutral:** Many leaders may not know much about knowledge management and will be neither supportive nor hostile. If they stay out of your way, you can make some headway, but it is much better if you can help move them to become supportive or participative.
3. **Lip Service:** Leaders may appear to endorse a KM program but in fact are only superficially supportive. For example, they may advocate usage of an Enterprise Social Network, but then continue sending email. They may say, "Everyone should fill in their personal profiles," but they have someone else fill in theirs. Instead of using a KM tool, they may delegate it to someone else. They may say they want a KM program but fail to allocate budget and resources for it. This is slightly better than the previous two responses but can be difficult to overcome. The appearance of support is disingenuous, but if you explicitly confront it, this may result in denial, defensiveness, and diminished actual support.
4. **Supportive:** This response is valuable, and includes helpful funding, messaging, and management involvement with goals, measurements, and recognition. This can get a KM program going and help it progress, but it is one level short of the ideal.
5. **Participative:** Senior leaders who lead by example, practice what they preach, and model the desired KM behaviors are the most likely to help your KM program achieve its full potential. Executives and their staffs should not only communicate about key initiatives. They should actually participate themselves in a visible manner.

Chapter 18: 36 KM Maxims

I developed a list of maxims in response to a discussion led by Verna Allee and hosted by the Association of Knowledgework. Verna asked community members "what, for you, are the tried and true 'classics' and what are the newer or 'emergent' maxims that you find yourself relying on in your current conversations?" Verna's question, and the ensuing discussion, prompted me to create this list of maxims for knowledge sharing, leadership, and personal growth.

Knowledge Sharing and Reuse

1. "Knowledge management" is a recognized term, but we can use other terms when we communicate to our users, such as "knowledge sharing and reuse."

2. Place more emphasis on connecting people than on collecting documents. But try to do both.

3. Despite the oft-stated goal of learning from past mistakes, we keep repeating them. To prevent this, Work Out Loud, ask if anyone has done something similar before, and search for reusable materials and experience before starting a new effort.

Innovation

4. The sooner you can try out an idea, the better.

5. A prototype or pilot can be useful immediately, and you can learn how to improve it from the users.

6. Prolonged study and planning cycles are not as useful as rapid prototyping and frequent incremental improvements.

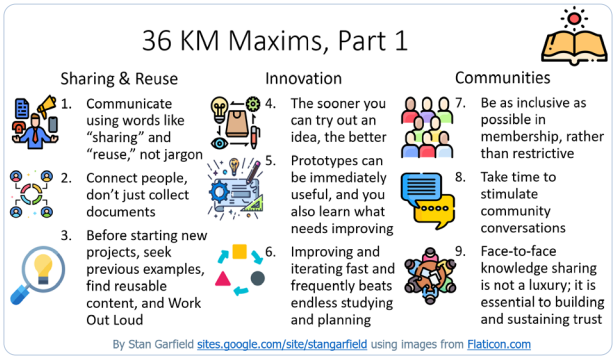
Communities

7. Be as inclusive as possible in community membership, rather than restrictive. What's the harm of an outsider joining? Maybe they will learn something, share useful information, or be able to answer a question. So don't keep out potential members - welcome them in!

8. Take some time to stimulate community conversations.

- Enable posting and replying by email to the community's threaded discussions and suggest that all members subscribe to email notifications.
- If a member posts a question, make sure that it gets a response.
- If your community has a regular call, leverage the threaded discussions as a means of continuing the conversation, or providing resources covered on the call.
- Set a calendar reminder to post every week, if there has not already been a post.
- If questions are asked or information is shared outside the community, redirect or copy to the community's threaded discussions.

9. Face-to-face knowledge sharing is not a luxury. It is essential to building and sustaining trust.



Killer App for Social Networking

10. Find a killer application for social networking within your organization, analogous to external ones such as Facebook, Instagram, and LinkedIn. A good option is Engage (part of Microsoft 365).

11. A killer app will get people to voluntarily sign up and maintain their personal information and networks.

12. Link your key knowledge initiatives to this killer app (e.g., sharing, innovating, reusing, collaborating, and learning).

Leadership

13. Leaders should be open, honest, authentic, accessible, and responsive. People want to follow good leaders who are inspirational, straightforward, and fair.

14. Bad leaders eventually get what they deserve, although it often appears to take too long for this to happen.

15. Set no more than three goals and keep them simple and easy to remember.

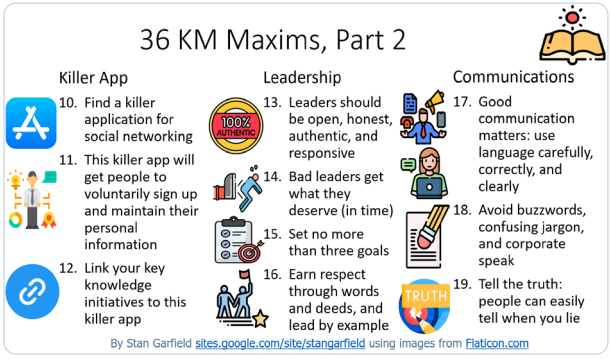
16. You can't make yourself a leader by proclaiming that you are in charge. You must command respect through your words and deeds, and by leading by example.

Communications

17. Good communication matters. Use language carefully, correctly, and clearly.

18. Avoid buzzwords, confusing jargon, and corporate speak.

19. Tell the truth. People can easily tell when you are lying.



Participation

20. Most community members, meeting attendees, and call participants are reluctant to speak up. They are glad to lurk and listen, but they prefer that others lead discussions.

21. People are more willing to enter questions and comments electronically during a call than to speak up and ask a question on the phone. So provide a way for them to do so, anonymously, if possible.

22. People are more willing to talk about a success story than they are to fill in a form to report on it, even if filling in the form takes less time. So find ways to get them to talk about their successes, and fill in the forms for them.

Crowd Behavior

23. People jump on bandwagons, follow fads, and use the latest buzzwords. Try to avoid these.

24. If you send out a legitimate message to a large distribution list requesting input, you will receive a limited number of replies.

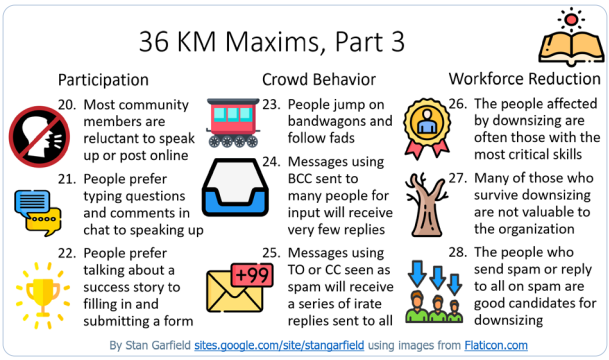
25. If you send out a message perceived as spam and include the distribution list in the TO or CC fields, many people will reply to all asking to be removed from the list, asking others to stop replying to all, or saying "me, too." This is what I call an email storm, and it may not subside for hours or days.

Workforce Reduction

26. The people who are affected by downsizing are often the people with the most critical knowledge and skills. As a result, laid-off workers often have to be brought back as consultants or contractors.

27. Many of those who survive downsizing are not valuable to the organization, leading the rest of the organization to wonder why these people are still employed.

28. The people who send spam and reply to all (as described above under the third point in "Crowd Behavior") are good candidates for downsizing.



Personal Growth

29. Don't hide – engage. Take a risk, get outside your comfort zone, and challenge yourself to try something new. Introduce yourself to someone you don't know and connect to them in LinkedIn. Ask or answer a question in a community, on a call, or at a meeting. Participate in or lead a discussion.

30. Submit an abstract for a presentation at a conference. Write an article and send it to a publication. Regularly blog, post to LinkedIn, or publish a Substack newsletter. You will be rewarded by the results.

31. Try out tools and processes yourself. Learn first-hand what works well and what does not. You will be able to empathize with other users, learn useful techniques, and become recognized as an expert. Be hands-on, use the tools of the trade, and practice what you preach.

Networking

32. Expand your personal network. Talk to other people at conferences. Contact other people, including those who don't know you and those who are famous. You will be surprised at how many people will be glad to interact with you, become part of your network, or join a community that you lead or participate in.

33. Share relentlessly. Look at each useful piece of information you receive, read, or create and ask, "who else could use this?" If others can benefit from it, share using LinkedIn, social media, or a relevant community's threaded discussion.

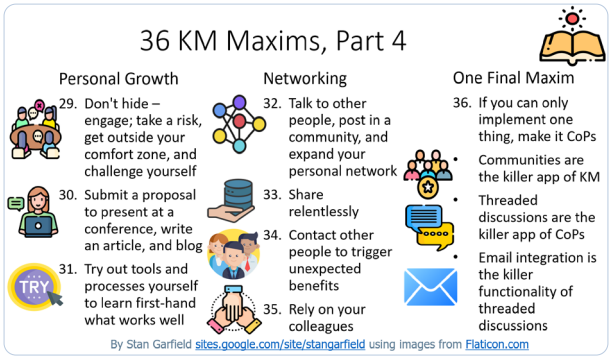
34. When you contact someone else, even if just sharing a minor piece of information, often it will lead to an unexpected benefit. They will be prompted to ask you a question, share an idea, make a suggestion, or schedule a time to catch up, all of which will be helpful.

35. Rely on your colleagues. Ask them to review what you are working on, and they will give you good advice. If you do good

things for others without concern for what's in it for you, your colleagues will be glad to reciprocate.

One final maxim

36. If you can only implement one KM component, make it communities of practice. Communities are the killer app of knowledge management. Threaded discussions are the killer app of communities. Email integration is the killer functionality of threaded discussions.



Chapter 19: 40 KM Pitfalls to Avoid

KM practitioners tend to fall into some common traps. It's important to be aware of them so you can avoid them. Here are 40 that I have seen people tripped up by over the course of my career in KM.

1. Trying to take on too much.

There are 50 KM Components (see Chapter 10) available for implementation. Avoid the temptation to try all of them, and instead, keep focused on choosing the few that will yield the greatest benefits in the short term to your organization.

And watch out for the allure of the latest technology, the current fad, or the tool that sounds too good to be true. Stick with proven approaches, even if they seem boring and predictable.

2. Focusing on technology.

It is common for KM initiatives to immediately be drawn to technical solutions, including tools, systems, and databases. These can help make a program succeed, but they should always be in support of a people or process component.

Implementing portals, repositories, search engines, and other tools will not automatically address how content is provided, whether or not people use the tools, or how the use of the tools yields beneficial results. Communities are groups of people, not ESNs or websites. Knowledge is shared and reused by people following processes, not by systems.

Some members of the KM team will still fixate on designing repositories, collecting documents, and reporting on minutiae such as uploads and downloads. Keep reminding them that connection is just as important as collection.

3. Not engaging the constituents.

Any new initiative will fail if it does not meet the needs of its intended audience or is perceived as being created in isolation. To prevent this from happening, treat your users as customers whom you are trying to acquire, satisfy, and keep.

Use virtual teams and communities to continuously solicit, capture, and respond to the needs of the people in your organization. Establish ongoing methods for two-way communications. Conduct surveys, publish newsletters, and maintain websites. And above all, listen to what your constituents tell you, and take timely action in response.

4. Doing too much studying and planning and not enough prototyping and piloting.

It's necessary to study and plan before starting a new initiative. However, there is a time to declare success for your planning efforts and move on. For example, after conducting a survey of existing tools, you may not need to conduct another one. And if you conduct monthly employee satisfaction surveys for a year and find that the results are not varying, you can probably stop doing them.

Prototyping and piloting allow you to test out new ideas, gain experience, and make iterative refinements. You can quickly learn that an assumption was wrong and modify your direction. Instead of planning for a new version of a tool or a website for six months, try making small incremental improvements each week. Users will benefit immediately from the changes, and they will perceive your team as being dynamic and responsive instead of slow and plodding.

You will encounter people who will want to plan and prepare endlessly rather than try things out. They will say, "We should probably do that, but let's develop a plan first," and there will be a lengthy planning cycle followed by the creation of a task force. We're so busy with our mundane dreary work that we don't realize that we could be doing something else. We could step back and figure out a better way that would actually end up saving us time. Instead of endless planning, we should integrate, innovate, and iterate as described in Chapter 11.

5. Not reusing what others have already learned and implemented.

Knowledge management has been around for over 30 years. A lot has been learned during this time, and you can benefit from this fact.

Reusing the ideas and experiences of others is what you are asking others to do in the KM initiative. You should model this behavior by applying it yourself. By sharing, innovating, reusing, collaborating, and learning with other KM professionals, you will show your organization how it is supposed to be done, and in the process, accelerate implementation and ensure success.

6. Focusing on collecting documents or updating skills profiles

In "Volunteer not conscript," Dave Snowden wrote, "If you ask someone, or a body for specific knowledge in the context of a real

need it will never be refused. If you ask them to give you your knowledge on the basis that you may need it in the future, then you will never receive it."

This suggests that asking people to fill in skills profiles, contribute documents, or otherwise share their knowledge without knowing how and why it will be used is a losing proposition. You can try to motivate people by making it mandatory, withholding payments or perks, or rewarding those who comply. But history shows that most people will resist, and if they submit anything, it will be the minimum required.

I have found that letting documents and expertise emerge at the time of need is a better approach. This is best done in a community of practice or an ESN group. If you need to find a document, or an expert to answer a question, talk to a client, attend a meeting, commit to a project, or supply documents – post to the most relevant community (or more than one, if appropriate) with your request. If your communities are working as expected, you will receive replies and can proceed. Documents and expertise will emerge in the replies to the query. By reading the full thread, you will get a sense of the context for documents that are offered, get different points of view, see points and counterpoints, and be able to synthesize multiple documents and the thoughts of multiple people.

7. Being gripped by anxiety

Seth Godin wrote about fear and anxiety in Linchpin: "The resistance (the lizard brain) exists to make you safe, which means invisible and unchanged. Signs that the lizard brain is at work:

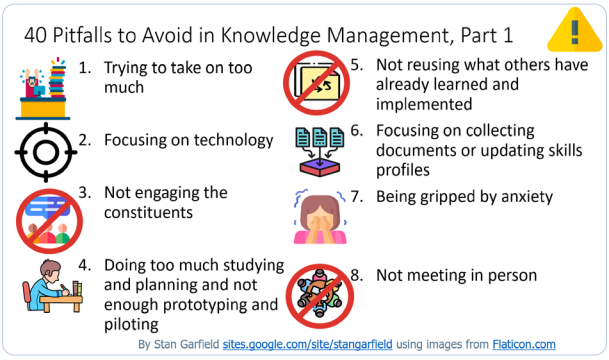
- Procrastination.
- You excessively criticize the work of your peers, thus unrealistically raising the bar for your work.
- You criticize anyone who is doing something differently. If they succeed, it means you'll have to do something differently too.
- Having an emotional attachment to the status quo.
- Inventing anxiety about the side effects of a new approach.

Anxiety is just a pointless form of fear; it's fear about fear. The resistance is really anxiety; real fear is a response to actual threats, and it's a perfectly healthy response. Reality is the best antidote for anxiety."

8. Not meeting in person

In this era of virtual work, face-to-face meetings are rarely held any more, although they should be. According to Eric Ziegler, "Face-to-face meetings are an investment, not a cost. While people work remotely, meeting face-to-face is absolutely necessary to build stronger relationships, increase trust, and improve collaboration. This is an absolute must."

And Bruce Karney wrote, "Face-to-face knowledge sharing is not a luxury. The pity is that in many organizations it is perceived as being one. There are indeed examples of effective knowledge sharing in the absence of face to face, but these are far outnumbered by examples of ineffective computer-based and phone-based collaboration. It is a dangerous delusion to believe that frequent face-to-face knowledge sharing meetings are a luxury."



9. Frequently reorganizing, including moving KM from one organization to another

KM struggles to find a home in organizations and is often moved around and added to groups which don't understand or appreciate it. Each time it is moved, a new boss who may be unfamiliar with KM takes over and selling that person on the program has to start over.

KM should not report to IT, HR, or some other function with other priorities. Regardless of where it reports, it should stay there long enough to gain traction.

10. Relying on maturity models and benchmarking

Each environment is unique. I recommend using frameworks, models, and benchmarking as sources of ideas, not as precise prescriptions to be slavishly followed. Seth Godin wrote, "Benchmarking against the universe actually encourages us to be mediocre, to be average, to just do what everyone else is doing."

People believe they need to benchmark competitors in order to do what they're doing. It's valid to find out what other organizations have accomplished. That's the value of going to a KM conference. We can learn and we can innovate on what we hear from other people, but if you only want to do exactly what other people are doing, then you're really just leaving it to someone else. You're not thinking about what's good for your organization. You're saying, "We'll do just exactly what someone else does," and that's not really going to be very innovative or may not even be relevant to the problems that you face.

There are divergent schools of thought on the desirability of KM maturity models. Several groups, including APQC, have published multi-level models that have been widely shared and used. Others are wary of such models, e.g., Nick Milton, who warns they are inappropriate and dangerous.

My view is that it can be helpful to identify your organization's current and desired states for a knowledge management program. It's better to understand your organization's specific challenges and opportunities, and map a course tailored to those specific needs. Understanding other KM initiatives is helpful, but don't try

to replicate them exactly. Instead, borrow, reuse, and adapt the ideas that best fit.

If you choose to assess your KM initiative using one of these models, don't worry too much if the result shows a low level of maturity. If your efforts result in tangible benefits, keep doing what you're doing, and look for additional areas of impact to pursue. And don't pat yourself on the back too hard if the model reveals that you are at a high level. Take such a result with a large grain of salt. Focus instead on how you can continue to improve.

11. Using the term "best practices"

The problem with the term "best practice" is that it connotes that an ideal has been achieved. It's better to learn about and adapt proven practices that fit your environment, whether or not they are the "best."

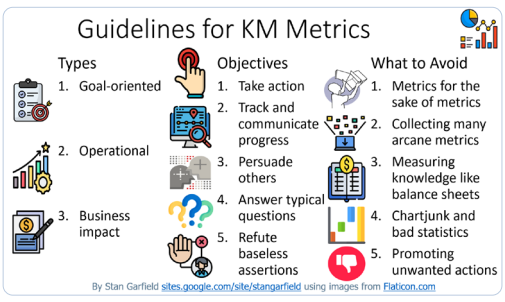
Proven practices are methods that have been demonstrated to be effective and lend themselves to replication to other groups, organizations, and contexts. Using them involves selecting, documenting, and replicating processes that have proven to improve business results so that others in similar environments or with similar needs can benefit from proven successes.

12. Reporting metrics for the sake of metrics

Avoid collecting every random thing, sliced and diced every possible way, which someone might want to know once. They probably have no intent to do anything with this data, other than to say, "Oh, that's interesting."

The main reasons to collect metrics are to:

- **Take action** based on what the numbers indicate. For example, if you are leading a communities initiative, report on the health of each community every month, and retire the inactive ones using a health report.
- **Track and communicate progress** against goals. For example, if you are leading a knowledge management initiative, identify the Top 3 Objectives, track and report on how the organization is doing in a monthly report, and inspect and discuss progress (or the lack thereof) in management team meetings.
- **Persuade others**, answer typical questions, and refute baseless assertions. For example, I sometimes received comments such as "no one uses our Enterprise Social Network." I refuted these by pointing out that the ESN actually had more than 100,000 members, more than 1,000,000 messages, and more than 150,000 files.



13. Becoming certified in KM

Taking a one-week class in knowledge management and then being anointed Certified Knowledge Manager is not meaningful and is generally not respected. Focus on learning, not on certification.

The field of knowledge management spans over 100 KM specialties (see Chapter 23 for the list). It is too broad to be certified in as a whole. Doctors get board certified in a specialty, not in the broad field of medicine, and only after many years of study and practice.

When I worked at Washington University School of Medicine's Biomedical Computer Laboratory, we taught a course called "Introduction to Programming the Laboratory Computer" which was aimed at doctors and other medical professionals. In two days, they were supposed to learn how to program a computer using assembly language. This was not a realistic goal, and most of them could not write a computer program after such minimal instruction and experience.

My colleague, Janet Johnson, and I created a spoof of this course, which we called "Survey of Medical Techniques." In two days, the course was supposed to teach the entire field of medicine to computer scientists, which seemed just as unlikely as teaching assembly language programming to physicians. Similarly, learning the entire field of KM in a one-week course is impossible, and becoming "certified" in anything at the end of that week is meaningless.

Patrick Lambe wrote, "The CILIP KM Chartership program is the only one I'm aware of that involves independent professional peer review of a practice portfolio, independent of the purchase of any training products."

14. Rolling out tools and driving adoption

Don't fixate on rolling out tools, and then trying to drive adoption, which is a losing proposition. Start with the needs of the organization, not with finding a use for a tool which you have already bought.

Rolling out a tool implies a tool that's in search of a solution. In the early days of SharePoint, for example, people would say, "We want to roll out SharePoint." They wouldn't explain why or what it was going to be used for. It just existed for its own sake.

The wish for everyone to start using a collaboration platform can lead to vague terminology like, "We want everyone to start collaborating globally. We want everyone to make connections. We want everybody to engage." If you don't get more specific than that, that's not a very appealing use case.

If instead you say that you want people to share, ask, find, answer, recognize, inform, and suggest, and then you go into a little more detail about each one of those use cases, people can better relate. You can have a conversation with them; ask them, "The last time you wanted to share something, what did you do? Did you share via email? How did that work? The last time you had a question, what did you do? Did you ask the person sitting next to you? How did

that work?" You can interact on the specific use cases, and then you can talk about how the tool you want them to use actually does that better.

15. Using buzzwords and corporate speak

Don't use buzzwords, insider jargon, or corporate lingo. Use words and expressions that are widely understood. Touting vague concepts like "increase engagement," "add value," or "drive transformational change" will not go over well with your audience.

Use obvious terminology rather than arcane, esoteric, or exclusive expressions known only to a clique, the in-crowd, or a single organization. If there is a widely known expression, industry-standard term, or well-defined abbreviation, use that instead of one known only to those previously initiated. This is especially important to avoid making newcomers to a group feel ignorant, left out, and isolated.

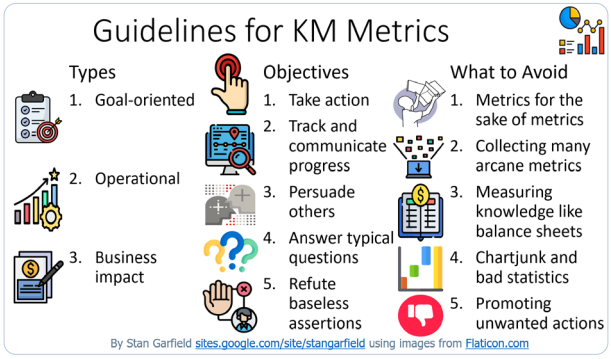
16. Telling others to do as I say, not as I do

Not practicing what you preach sets a bad example. People will closely observe the actions of leaders and mimic them. So lead by example and model the desired behaviors.

This starts with leaders who initiate a KM program and then leave it to others, saying, "Okay, you take it from here and I'll do something else." Or people who work in knowledge management, but who don't lead by example. They want everyone in the organization to use a particular tool or to follow a particular process, but then they don't do that themselves. They figure someone else will do that.

You run into this when you're encouraging a leader to interact in an Enterprise Social Network or to use one of the KM tools. Instead, they delegate it to someone else. They may say, "you fill in my profile," or "you post for me," or "you ghost write it for me."

We can all sense that when that happens. You can't get away with it. If you really want someone to do something, one of the very best ways to do is to do it yourself and then, not only will you learn about how it works and the pros and cons of it, but other people will also see you doing that and they'll do it as well.



17. Being secretive

Don't give lip service to transparency while continuing to operate in a closed manner. Communicate frequently, truthfully, and openly.

A knowledge management paradox is the existence of private communities and Enterprise Social Network groups. Knowledge sharing is best done in the open, allowing anyone and everyone in the organization to participate and benefit, but some argue that this is not always desirable.

I have heard the following reasons for preferring to share or ask in closed, private groups:

1. Comfort: People are more comfortable sharing or asking in a small group of known colleagues.
2. Trust: People don't want to share with anyone unless they have an existing, trusting relationship with them.
3. Fear: People are reluctant to expose their ignorance broadly.
4. Theft: Others will steal our valuable intellectual property and benefit from it unfairly.
5. Abuse: Others will misuse our materials and cause harm or require us to have to clean up their mess.
6. Need to know: Only those with a need to know should have access.
7. Secrecy: We need to hold confidential discussions and keep others out. We can't allow others outside of our team to see what we are doing and discussing.
8. Soft launch: We'll start out as a small private community, and then we'll open it up later after we are ready to do so.

Here are counter arguments for each of these:

1. Comfort: Discussing in a closed group is like talking in an echo chamber. The same ideas are repeated and agreed upon, but fresh insights from a more diverse set of people are missed.
2. Trust: Ask people if there would be any harm if those they don't know join the group and are able to benefit from what is being shared, or if they are able to answer a question. The answer will likely be a reluctant "no," which should help them realize the benefits of being more inclusive. And once outsiders join and contribute, they become trusted, and the original concern is reduced or eliminated.
3. Fear: This is natural, so take steps to praise, thank, and recognize those who share and ask in the open.
4. Theft: Remind people that everyone works for the same organization, with the same overall success goals. Thus, "stealing" is not the best way to perceive cross-organizational reuse.
5. Abuse: Most presentations and documents are of limited value without the context for using them. If you share them, it's more likely that you will be asked to deliver your presentations or implement projects using your documents than that others will try to use them without your knowledge.

6. Need to know: The problem with the term "need to know" is: how do you know who needs to know? It's impossible to know in advance all of the people in your organization who could contribute or benefit, so posting in private risks missing many of these people. It's better to change from a mindset of "need to know" to "need to share."
7. Secrecy: This goes against the whole idea of knowledge sharing. Challenge those with this view to define the actual dangers posed by operating transparently. Chances are that the threats are more imagined than real.
8. Soft launch: This is just an excuse for not doing it right the first time. Small private groups are unlikely to grow and become active, and as a result may fail. The people who will help the group grow and thrive may not be known to you, so being open enables them to join and help lead the way.

Here are three additional arguments in favor of public, open sharing and collaboration:

1. **Reach the right people:** Posts made in small private groups are likely to miss those who could benefit, and many questions may go unanswered or receive inadequate responses.
2. **Get your ideas out there:** Sharing broadly allows your team's thoughts, plans, and actions to be tested, challenged, and adopted. This enables growth, innovation, and proof of value.
3. **Create demand** for your team's skills and expertise: For authors, publishing books leads to more consulting and speaking opportunities, not fewer. In theory, others can read your ideas and use them without your involvement, but in reality, they are more likely to invite you to come meet with them, present during a meeting, or deliver an engagement.

18. Making it difficult to find information and resources

Search doesn't work the way people expect it to. To address this, focus on making content findable through tagging consistently, offering search best bets, and providing relevant content for the most frequently searched for topics.

Beyond organic search results, useful content can be more intentionally provided. To do so, determine the topics of greatest importance to the organization, curate a list of relevant content that can be searched and filtered, and feed the entries as enterprise search results. These can be in the form of curated answers – best bets (thumbnails and links only), authoritatively-badged content, or quick answers (more complete content plus links) for the content deemed to be the best for each of these key topics. They can also be dynamically generated using attributes, tags, sorts, filters, GenAI, human interaction, etc.

19. Lacking trust

People are reluctant to ask for help in public, contact people in other organizations, or say the wrong thing. They would rather suffer in silence than expose their ignorance to the world, or to be criticized, blamed, or ridiculed. They may be afraid that if they share knowledge, people they don't trust will misuse it or use it without attribution.

Their concerns include:

1. Can I trust the answers and advice provided by others?
2. Can I open up and be candid?
3. Can I share information without being embarrassed?
4. Can I ask a question without appearing ignorant?
5. Can I trust people to not misuse the content I share?
6. Can I trust people to give me credit for information I provide?
7. I'm worried about giving the wrong answer to a question.
8. I'm reluctant to share information that may not be the very best.
9. I'm worried about being criticized, blamed, or ridiculed.
10. I'm afraid that I might be perceived as wasting my time by participating in an Enterprise Social Network.

Leaders may be concerned about the following:

1. Can I trust people to behave properly? I don't want to enable flame wars, abuse, bullying, harassment, political or religious discussions, commerce for personal benefit, solicitation, or anything else that is inappropriate for our work environment.
2. Can I trust that people won't waste their time in an ESN? I don't want to encourage idle chatter, irrelevant conversations, or pointless sharing of personal photos, videos, music, or other social media content.
3. Can I trust that the organization's proprietary information will not be shared improperly? I don't want to make it easy for people to leak confidential content, either intentionally or accidentally.

Despite these concerns, leaders should trust people to do no harm. It doesn't mean that people won't do harm. They may do it intentionally or unintentionally, but if they do it in such a way that you can see it, then you can counsel them and you can intervene.

Here are ways to build trust:

1. **Facilitate conversations** between people. Make time in meetings and calls for people to get to know one another.

2. **Encourage frequent storytelling** by leaders and knowledge workers. Have them tell their personal stories to let others know who they are.

3. **Schedule regular face-to-face meetings**. You need to meet in person in order to establish trust between team members.

4. **Support communities of practice**. People don't want to share with anyone unless they have an existing, trusting relationship with them. But once outsiders join and contribute in a community, they become trusted, and the

original concern is reduced or eliminated.

5. **Implement an ESN** with open groups, and lead by example by being active in it. Connecting people, giving them a voice, and allowing them to express their individual personalities increases trust.

20. Pushing content

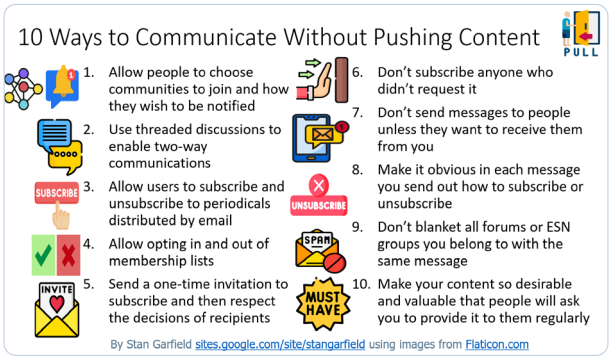
Organizations want to push information out to audiences, rather than making it attractive to pull content for themselves or enabling interaction with leaders. People are used to tuning out pushed messages and will be annoyed if they persist.

Marketing communications teams, leaders, and anyone wanting to communicate information are interested in getting their target audiences to receive, understand, and remember their messages. The ways they attempt to get these messages out include:

1. Publicity: "We need to let everyone know about our message using every possible channel."
2. Advertising: "We want people to click on our ad to get more information."
3. Banners: "We need to have our message at the top of every page of our intranet so it will catch everyone's attention."
4. Widespread posts" "We should post our message in every community, group, and online discussion."
5. Email: "We should send out an email to everyone."

Better alternatives to pushing content include:

1. Allow people to choose which ESN groups or communities to join and how they wish to be notified of new communications, instead of sending out email messages to large distribution lists.
2. Use an ESN or threaded discussion to enable two-way communications; solicit feedback, questions, and suggestions for each communication. This is especially valuable for leadership communications.
3. Allow users to subscribe and unsubscribe to periodicals distributed by email.
4. Allow opting in and out of membership lists, using tools and services that allow people to subscribe and unsubscribe easily.
5. Send a one-time invitation to subscribe to a wide audience, and then respect the decisions of the recipients.
6. Don't subscribe anyone who didn't request it.
7. Don't send messages to people unless they want to receive them.
8. Make it obvious in each message you send out how to subscribe or unsubscribe, and make sure that links really work or that a real human will take any requested action in a timely manner.
9. Don't blanket all communities or ESN groups you belong to with the same message; if a message is relevant to more than one community, craft a brief, customized version that is specific to each one, explain why it is relevant, and include a link to the full message that is posted elsewhere; limit this to just a few communities.
10. Make your content so desirable and valuable that people will ask you to provide it to them, will eagerly await updates, and will be disappointed if updates are not frequent enough.



21. Expecting that someone else will do it

Some people don't want to get their hands dirty by learning by doing. When a new tool comes along, the people who are trying to promote it have to be the first ones to jump in and try it. That can be messy: it may not work right and it might be hard. If you don't try it out and then you turn around and ask others to do so, that's not a good look.

This happens when trying to get people to use knowledge management tools by asking them to post in an Enterprise Social Network, contribute documents, or anything that requires them to take a risk, hoping that someone else will do it. If most people never contribute anything at all, then knowledge sharing programs aren't going to work.

If you do a search and you don't find what we're searching for, you can blame the search engine, but more often than not, it may be that the thing you're searching for just isn't there. No one contributed it. You hope that you can just search and find it, or that someone else will ask the question that your were thinking of asking, but were afraid to ask, and then you will benefit from the results. But if that doesn't happen, then no one ever learns. We've got to be willing to do it ourselves as opposed to expecting someone else to do it.

22. Believing that KM is dead

Ironically, the assertion that KM is dead keeps coming back to life. We've been hearing this for the last 30 years. KM first came to prominence in 1995, but a year later, people were asking if it was dead. Along the way, so was everything else that we used. We heard that email is dead but it doesn't seem like it is. We still get lots of it. Some proclaim that social business is dead. Whatever it is, saying that it's dead just seems like a way to generate interest in a point of view or sell a product or sell a service. You can make a claim like that and it'll be provocative and people will tend to pay attention to you, but that doesn't mean it's accurate.

It's not like everything is 100% perfect, but there are more positive indicators than negative indicators. Something is going on that

continues to sustain it. It may not be rapidly growing in size, but knowledge management is not dead. The need for knowledge management will endure, whether we continue to call it knowledge management or start calling it something else. We will continue to need to share and innovate and reuse and collaborate and learn. See Chapter 24 for more.

23. Believing that incentives don't work

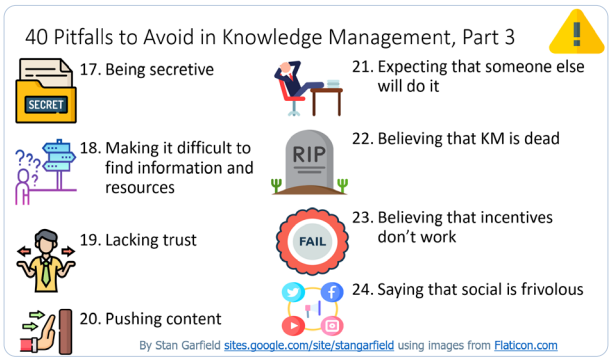
As long as I have been in the field of KM, I have heard that incentives don't work. I developed incentive systems that worked quite well and have been adopted by other companies. But there is a belief that extrinsic motivation is not effective in the long run. See Chapter 21 for evidence to the contrary.

24. Saying that social is frivolous

We've all heard the claim that social media is frivolous, social is not serious, or it's a waste of time. You shouldn't call your Enterprise Social Network "Facebook for the enterprise," because a lot of people will conjure up something different from work if you talk about social in that sense. Some people even say to avoid the word "social" altogether, giving the example, "I don't care what you ate for breakfast."

I don't actually see a lot of posts about what people ate for breakfast. I don't think that's the primary use of social media, but that's a common lament. You have to cite your use cases and say, "No, we're not really talking about sharing what you ate for breakfast. We're really talking about these other uses that are valid and that social tools do better than other previous tools."

There is also the assumption that using social media means wasting time. People have told me, "I was chastised for using the Enterprise Social Network to post something and was told to stop doing that and go back to work." You can turn that around and say, "What were you supposed to do instead?" The time that people spend on Enterprise Social Networks or communities, if it is for sharing useful information for the rest of the organization, or asking and answering questions, should be celebrated. We should not make people think that it is a waste of time.



25. Not controlling the creation of communities and ESN groups

In the community realm, we often get into a debate about whether we should try to control the creation of communities. There is value in trying to limit the number of communities that any organization has. There are a lot of reasons to do this, but the counterargument is that we should let a thousand flowers bloom and rely on survival of the fittest to sort them all out. Let there be 100 different communities all focused on social media. One of them will emerge and that's the way it should be.

If you have 100 communities for social media, there won't be any survival of the fittest. They will all die. It's because when someone tries to learn about social media, they look at the available communities and see a bewildering list of communities to choose from. They just give up, or if they do pick one, they will miss lots of other people who would have benefited from sharing information or who could have answered questions. None of the communities ever achieve critical mass, and as result, none thrive.

Allowing an infinite number of communities doesn't work well. In this instance, limited control has value. Get groups to combine. Govern your communities so that it's easy for users to figure out which one to join, and to achieve critical mass where all people interested in the same topic can be together. You should try to prevent redundant communities, but it's not because you're trying to exert some kind of top-down authoritarian control. Rather, it's to respect your users – to give them an easy-to-understand environment where they know which community to join, and all the right people can reliably be expected to be members of that community.

The existence of multiple communities focused on the same topic presents challenges:

- For members, they have to choose which group(s) to join and which ones to set email notifications for.
- For people wanting to post, they have to choose which group(s) to post to, and possibly have to cross-post multiple times to reach their intended audiences.
- The people who can answer a question or benefit from seeing shared information may not belong to the group in which it is posted.

Consider these questions:

- If someone posts in one of the overlapping communities, will it reach everyone who might benefit?
- If someone asks a question in one of the communities, will it receive timely and diverse answers?
- Are the members of each community seeing all of the conversations relevant to the community's topic?
- Are posts having to be cross posted in multiple communities, thus increasing the noise level?
- Would there be any harm in having discussions take place in a single community with more members?

Consolidating similar communities yields multiple benefits:

- Makes it easier for users to find the right group to join and participate in.
- Achieves critical mass of members and posts.
- Avoids fragmentation and duplication of posts.
- Shares the effort of managing a community and moderating discussions.
- Increases the likelihood of questions receiving timely

replies.

26. Trying to eliminate all risks

Some companies are very sensitive to risks. They are concerned that employees might somehow share information that they shouldn't share, or that information might be leaked somehow. In some cases, they try to control all access to the outside world.

If you have an Enterprise Social Network and it is open, then you will be aware if such a thing happens, because you will see it. If you don't allow that, what happens? People do it some other way that you don't see. You can't prevent somebody from handing a piece of paper or sending an email or having a phone call or some other means. You can't realistically control that. Yet some companies think that if they block access to social media, it will eliminate the risk of leakage. It's actually better to encourage things to be shared where you can see them, and if somebody does something inappropriate, you can talk to them and take corrective action. Whereas if you drive it underground, you can't address any infractions.

If you don't trust people, why did you hire them? You hire them and entrust them with the work you assign. You should trust them to use good sense also when it comes to sharing information.

27. Trying to be like Google and Amazon

Have you ever been asked why your search isn't more like Google? We all know the reasons why people ask that. The reason enterprise search is different from Google has to do with scale and the difference between the millions of people on the Internet and the thousands or hundreds of people in your enterprise. But users still ask the question. You may even have leaders who say, "Let's make our search just like Google."

The other one that arises is, "Let's have content ratings like Amazon." That also does not work well when not at scale. The percentage of people who actually rate things on Amazon isn't very large, but because there are so many people, the number who do so is large enough to matter.

Inside of an enterprise, the percentage of people who might actually rate a document is tiny. Typically, you see only two types of people who actually give a one-to-five-star rating on a document. The person who wrote it will give themselves five stars, and someone else who has some axe to grind with them will give them one star. The resultant ratings, if any at all, are not useful.

When I'm asked to give with a five-star rating, it's hard. I have to struggle with, "Is this three or four or five?" so I won't do it. That's the wrong approach. It's better to ask simple questions such as, "Were you able to reuse this document?" That's a yes or no question, and an easier one to answer. It's just like the Like button. If you click the Like button, you don't have to think too hard about it. You either like it or you don't. If you have to rate something one, two, three, four or five, you have to think about it, and that's a different dynamic.

I like this approach better: "Click here if you were able to reuse this document." That's a very objective statement. You either were able to reuse it or you weren't. If a document's button is clicked a lot, then you can say it's probably one that you want to promote or have it appear higher in search results. Think about how these things actually work behind firewalls inside of enterprises and treat them differently than trying to make them just like Google or just like Amazon.

28. Saying "We need our own"

Often, the reason given for doing something is the stated belief that "we need our own." I received requests like, "Can I have a community for SAP?" I replied, "We already have one. Why don't you just use that community?" They replied, "I need my own." They don't articulate it well as to why, but it's generally some variation of "our situation is unique." It could be for what they think is a valid reason. They said "We need one just for this country that we're in. We need a knowledge management community just for Portugal." I replied, "Is knowledge management that different in Portugal from how it is in some other country?"

If they wanted to have conversations in Portuguese, that might be a valid reason, but if they simply want an English-language community just for people in Portugal, then there are two problems with that. There aren't going to be that many people in it. And they will miss out on all the other knowledge management people in the other community. Tell them, "You don't really need your own" and try to refocus their energy to start their own new community into helping lead the existing one. In this case, the best advice is to say, "I'm glad that you're excited to lead this new community. Let's make you a co-leader of the existing one. We can really use your energy bringing in your colleagues from the organization you're in." The alternative is to try to get a new one off the ground, which isn't likely to go well.

Another issue is internal versus external -- the desire to have an internal community, online discussion, or repository, when in fact, most of the wisdom about the subject may be outside of the company. This occurs in an internal community where people ask a question that could easily be answered in an external community but receives no useful replies internally.

The other case is the narrow niche. For example, a request for an Enterprise Social Network group for European specialists in the FI module of SAP. I have seen people create such a group and then write an initial post like, "Hey, everyone. We're going to talk about the FI Module!" And they are the only member of the group. No one is actually seeing their excited post. We need to help them understand and educate them and guide them, but we also need to help them see that when you don't get critical mass in a community, you generally don't have an active community.

29. Saying "I don't have time"

A typical lament is, "I don't have time for that," meaning a variety of things. "I don't have the time to do the thing you're asking me to do. I don't have time to participate in communities. I don't have

time to be on calls. I don't have time to go to conferences."

What that implies is they don't think that learning is as important as mundane tasks. If you said, "Why didn't you attend the community call this week?" they'd say, "I had other stuff to do." What exactly is that other stuff? Often, it's attending some meeting or it's doing some kind of mundane work.

A reasonable response to the lament is, "We're in the field of knowledge management; we're trying to get people to learn and get better at things. Won't we do that ourselves? Won't we make one hour a month to learn more about our field?"

Instead, we get consumed by the mundane. No one's making you learn. No one's making you attend a conference. When you do, you are going to get better at KM. The excuse that you don't have time generally means that you don't think it's important, and you should probably stop to reevaluate that.

30. Saying "We should work ourselves out of a job"

I have seen the statement that "we should work ourselves out of a job." The argument is that knowledge management is everyone's job. Therefore, we don't really need knowledge management as a department. We don't really need to be full-time knowledge managers. Our goal should be to not even need knowledge managers anymore. My response is, "What about Finance, HR, and Operations? Is it their goal to work themselves out of a job? Are we going to get rid of the Finance department because finance is all of our jobs?"

This is a fundamental mistake. It's all of our jobs to actually share and reuse and do the things that knowledge management includes. For anything to actually get led in an effective way, there needs to be somebody leading it. To say that there will be no one leading knowledge management and everyone will just do it is naive. It's not that you need a gigantic knowledge management team, but you always need at least one person who is worrying about this. You may need a few more.

When you say it's everyone's job, it's true that it's everyone's job to practice knowledge management, but it's not everyone's job to advocate for it, to champion it, and to shepherd all the people, processes, and tools that go into knowledge management work. We're not trying to work ourselves out of a job. We're trying to ingrain knowledge sharing into the work of everyone else, but not necessarily to eliminate the people trying to lead the effort.

If you have an organization with a few people, with someone leading people projects and someone else leading process projects, and a third person leading technology projects, and you have some extended virtual team members, that may be all that you need. You don't necessarily have to have a monolithic structure, but you need some dedicated effort to shepherd knowledge management.

31. Believing that bigger is better for organizations, and that smaller is better for community membership

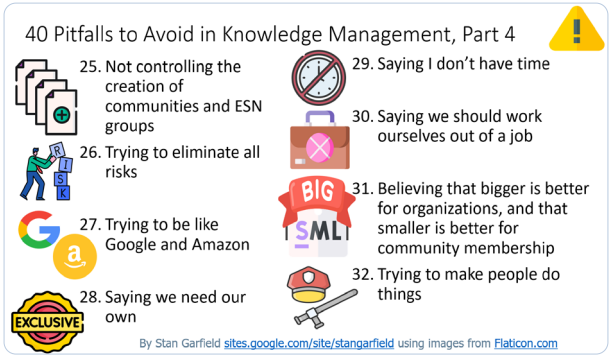
Some KM leaders think, "The bigger the team we can have, the better. The more power I'll have. The greater importance I'll have in the organization. I'll measure myself by that." This leads to building up a large team, sometimes with a large offshore presence, that signifies importance. But large doesn't necessarily mean more effective. In fact, many times the larger you get, the less effective you get, because you're spending all of your time coordinating and communicating with many different people. If you get down to a smaller number, you can spend less time doing that.

Large isn't necessarily better in terms of teams, and large isn't necessarily better in terms of anything else. The more websites you have isn't necessarily the better. There are some instances of organizations with millions of web pages. That's not a good thing, nor is having websites with lots of animation, widgets, and dense content.

Actually, as Google showed when it came on to the scene, simpler was better. The initial Google interface was just a box in the middle of the page. Meanwhile, the previous search leader, AltaVista, had evolved to include all kinds of things. It had every kind of available information on the page, but that wasn't what people wanted. They wanted something simpler. More is not necessarily better. Some people tout the fact that they have lots of ESN groups. That could be bad because more groups can be confusing and duplicative

On the other side of the coin, some knowledge managers believe that small communities are better than large ones, because all members know each other and thus have greater trust than in large communities. At Deloitte, we studied the number of people you need to have for a community to be active. That number turned out to be 200. If you have 200 or more, there is greater likelihood of an active community. If you have fewer than 200, it's less active. It doesn't mean that there aren't counter examples. It just means that on average, if you don't get to that magic number, it will be difficult to succeed.

So the exception to the bigger is not better rule is that the more community members who are paying attention, the better. Sometimes people ask me, "Isn't there an optimum size, or shouldn't you try to keep it small?" If you have 1,000 members in a community and then member 1,001 joins, that's not going to cause any harm. Member 1,001 may begin learning and benefiting from the other 1,000 members. They may be able to answer questions and share useful information. In the case of community membership, more is better, unless the volume of posts increases beyond a tolerable level. In that case, which rarel occurs, the community can be split up to reduce the noise level.



32. Trying to make people do things

The expectation that you can make people do things is naive. For example, trying to make people maintain their expertise profiles is not something they like to do. In the early days of KM the request was, "Contribute all your documents to the repository so they can all be reused." No one wanted to do that. The idea that you can make somebody do something is not realistic. If you try to enforce it by using brute force, people will do the minimum amount possible.

Forced membership in communities isn't a good idea. Participation in communities should be voluntary. Or the wish that everyone will start using the intranet from one home page. Some think, "Here's our intranet home page. We're going to put a banner ad on there because everyone will go there." But they won't. They're going to bookmark some other page and go there, and you're not going to be able to determine where they go. Don't even try. Instead, try to pull them in. If you need to locate expertise, instead of making people fill in their expertise profile, let them join communities and let the expertise emerge in the community.

33. Implying that everything is a community

I have heard community used in some strange ways, as if everything is a community. I hear entire populations referred to as a community. My definition of community is a voluntary group that you join because you want to get better at something, not something that defines the organization you're in, the ethnicity that you have, or some other attribute.

A community is something you choose to join because you want to meet up with other people who are interested in the same subject. A community is not a website. It's not a wiki. It's not a blog. It's not an ESN. It's not an organization. It's not a project team. It's just the people who choose to learn more about a subject by coming together.

Communities are a fundamental component of knowledge management. I recommend reading my book on this subject: *Handbook of Community Management: A Guide to Leading Communities of Practice*.

34. Worrying that IP will be stolen

Some people worry that their team's intellectual property will be stolen. I remember many a discussion inside of companies that I've been at where people said, "We've got to lock down this content because some other part of our company will use it in the wrong way."

Here's an example of that. I was at a company in which we had a consulting division and a field service division. The field service division realized that they needed new sources of revenue because maintenance was a declining revenue stream for computers. They believed they needed to get into new services. The consulting business then became wary: "If we publish any of our material that we use to deliver services, the field service business is going to steal it and they'll go out and deliver those services and we'll lose revenue. Let's make sure that we make this accessible only for consulting people."

Of course, that's not very realistic, because a field service technician in possession of some project plan from a consultant is probably not likely to be able to go out and deliver that consulting service. What's more likely is that they'll come to the person who posted it and say, "I see that you posted this document. My customer wants to buy that. Can you help me deliver it?" The thinking that you need to lock it down and secure it so that other people can't see it goes against the whole concept of knowledge management.

Contrast private ESN groups or locked-down content with what knowledge managers are trying to do, which is to get people to share and to be more open in that sharing. You have to ask, "Why secure that content?" The answer may be "To prevent competitors from getting it" or, "To prevent disgruntled employees from getting it." There are legitimate reasons – you might be working in a project team that needs to limit access to the project team's content – but that's different than a broader community or knowledge repository. If you encounter this, ask, "Is there truly a risk that we're dealing with here, or is it only imagined?" Show how the benefits of open sharing outweigh the risks of unlikely events.

35. Using the DIKW pyramid

David Weinberger wrote, "I've long been irked by the Data-Information-Knowledge-Wisdom pyramid that is so often casually embraced as if its truth were obvious. I disagree with its implication that knowledge is a filtering down of information. I disagree even more that wisdom is a filtering of knowledge. But perhaps most irksome to me is its leaving understanding out of the picture entirely."

I see no need for creating pyramids, hierarchies, or other similar, meaningless representations. I define knowledge as information in action. If you are thinking about using DIKW or any other similar pyramid in a presentation or document, step away from the keyboard. Leave it out and find a more meaningful way to make your point.

36. Denying the 90-9-1 rule of thumb

In a typical community, 10% or fewer of the members will tend to post, ask questions, present, etc. The rule of thumb is that 10%

of the members will participate at all, and only 1% will regularly be active in discussions and presentations. 90% will not post or speak up at all. Some have questioned whether this rule of thumb really applies.

Actual data from Deloitte's ESN showed 94-5-1. The SIKM Leaders Community's online discussions showed 96-2-2. So 90-9-1 may actually be optimistic.

Expanding on 90-9-1, it would be useful to add a fourth number representing the people who join communities but don't pay any attention to what is going on. This makes a distinction in the 90% between learners and join-only members.

Learners pay attention to the community's discussions, shared content, and events. Join-only members may have good intentions, but they end up being essentially the same as non-members, because they receive no benefits from being members.

There is nothing wrong with the 90% not posting, as long as they read, listen, pay attention, etc. But if they don't, then they are not getting value from the community, and the organization misses out on their personal development and/or their contributions to the other members.

What would happen if 90% of community members posted regularly? In a small group, that might be okay. But in a large community, the volume and frequency of posts would likely become a problem.

More frequent posts from more people can result in more noise and can cause members to stop paying attention. So those who lament that only 10% of a community are active should consider the possible negative consequences of a dramatic increase.

If people will just pay attention, read, and learn, that is valuable. And based on my experience, that will be the most we can expect from most members.

From The 90-9-1 Rule for Participation Inequality in Social Media and Online Communities by Jakob Nielsen: "How to Overcome Participation Inequality: You can't. The first step to dealing with participation inequality is to recognize that it will always be with us. It's existed in every online community and multi-user service that has ever been studied."

Don't waste time trying to change this to 70-20-10 or 55–25–20, as some articles have suggested are the actual numbers. The power law (orders of magnitude) appears to be a law of human nature, so overcoming it is akin to repealing the law of gravity.

37. Trying to compute the ROI of KM

So much has been written and presented about the importance of coming up with the Return On Investment (ROI) of knowledge management that it has become widely accepted that this is necessary for justifying a KM program. In fact, KM is just one of many variables that influence the desirable outcomes that ROI could be calculated on. It is impossible to prove that KM is the sole contributor to any general business metric, such as sales, revenue, profit, quality, or customer satisfaction. It is certainly hoped that KM is one reason for success, but it may also be the result of the efforts of other functions, such as learning & development, marketing, supply chain, quality, innovation, engineering, marketing, sales, service, and operations.

Richard Cross wrote, "Never trust someone who says, 'Show me the ROI' or 'You can only manage what you measure.' Anthropologists maintain that in every culture there are apparently rational questions that mask hostile intent. 'Show me the ROI' or 'Yes, but how do you measure it?' generally fall into this category. When confronted with these types, start to get alarmed. The most important point I recall from my sales training is that a customer's concern in a complex sale is risk. Consequences (risks of going ahead with you) must be managed but most lurk behind the surface. Asking for demonstrable ROI could be an early warning on risk, customer insecurity, and lack of their (or your) credibility.

Price concerns and guaranteed ROI then become respectable and convenient ways to express concerns over consequences. It's easier for people to tell you that they have decided not to buy because of these issues than to explain issues such as mistrust, scars from mistakes made before, politics, hassle, not interested, risk to career or company, or the simple fact that they don't like you. Consequences are psychological issues in a person's mind. They are not in the real world – only the customer can resolve them. In selling KM, help the customer – don't resolve the problem on his behalf. Get the real concerns out in the open and look to develop trust rather than engage in futile intellectualizing about ROI."

Instead of trying to compute the ROI of KM, use better ways to establish its value. See Chapter 22 for details.

38. Archiving content after 90 days

Knowledge repositories are sometimes configured to automatically archive documents after some predetermined period of time. The intent is that after content has been available for 90 days (or whatever duration is chosen) it is no longer current and thus should be removed from the repository. The assumption is that this old content should not appear in search results or in lists of available documents.

There are several reasons offered for automatic archiving. Old documents are no longer relevant, accurate, or useful. Searches yield too many results, so weeding out old documents will improve user satisfaction with search. Content contributors should refresh documents periodically.

Contributed content does not automatically become obsolete after a fixed period of time. It may remain valuable indefinitely. I offer the analogy that just because Peter Drucker died in 2005, we don't remove his books from the library. His insights will continue to be useful for a very long time.

One firm where I worked had an automatic archiving process. As a result, I would often receive messages from frustrated users who were searching for content they had previously found in the

repository but could no longer locate. I would have to restore this content from the archive to the active repository. This caused users to be annoyed with the KM program, resulted in a lot of wasted time and effort, and sometimes delayed the retrieval of important information needed for client work.

In Knowledge management and innovation, Steve Denning wrote: "The quality of knowledge does not depend on whether it is old or new but rather whether it is relevant, whether it still works. Whether it is old or new hardly matters. The question is: does it work? The dynamic of academia is different. Here the new is celebrated, whether it is useful or not. The old is looked down on, not because it isn't useful, but because the raison d'être of academia is to create the new, not the useful. Innovation in industry will often draw on lessons from the past, particularly those that have been forgotten, or those that can be put together in new combinations to achieve new results. The bottom line however is not whether the knowledge is new, but whether it works in practice."

With the cost of mass storage steadily decreasing, there are few good reasons to remove content from knowledge repositories unless it is known to be outdated, incorrect, or useless. Instead, allow search engines to limit results based on dates and other metadata to help users more easily find the content they need.

Don't automatically archive content in a knowledge repository, threaded discussion, or other collection of knowledge. Instead, ensure that the search engine can limit results by the date of the knowledge object. Defaults can be set to limit results to the last 90 days, one year, or whatever duration is desired. But it should be easy for users to change the date range to include older content in the search results.

39. Seeking a new name for KM

People frequently say that we shouldn't call our field knowledge management, and that we should call it something else. I identified 50 different names that various people have suggested for what we call the field currently known as knowledge management (see below).

There's nothing wrong with any of them, but we're still calling it knowledge management. That's the label that has stuck. Spending a lot of time talking about what we should call it probably isn't as helpful as worrying about how to do it better.

1. Best Practice Replication
2. Best Practice Transfer
3. Business Improvement Services
4. Collaboration
5. Collaboration Systems
6. Collective Learning
7. Communities
8. Digital Enterprise
9. Digital Transformation
10. Enterprise 2.0
11. Enterprise Collaboration
12. Enterprise Content Sourcing
13. Enterprise Learning and Collaboration
14. Enterprise Social
15. Enterprise Social Network
16. Insights
17. Intangible Asset Plan
18. Intellectual Capital
19. Intellectual Property
20. Knowledge and Information Management
21. Knowledge and Information Sharing
22. Knowledge and Learning Processes
23. Knowledge Development
24. Knowledge Enablement
25. Knowledge, Engagement and Collaboration
26. Knowledge Exchange
27. Knowledge Flow Management
28. Knowledge Management
29. Knowledge Processing
30. Knowledge Publishing and Curation
31. Knowledge Retention
32. Knowledge Science
33. Knowledge Services
34. Knowledge Sharing
35. Knowledge Sharing and Collaboration
36. Knowledge Transfer
37. Learning and Knowledge Exchange
38. Learning Communities
39. Learning from Experience
40. Management
41. Organizational Effectiveness
42. Post-Industrial Knowledge Age Transformation
43. Performance Management
44. Radical Connectivity
45. Social Business
46. Social Collaboration
47. Social Learning
48. Social Media
49. Social Networking
50. Tackling Wicked Problems

Knowledge Management has been around as a term for over 30 years, while other terms such as Enterprise 2.0 have come and gone during that time. So even if it is not the best term, it is a recognized one, and attempts to replace it have not been successful so far.

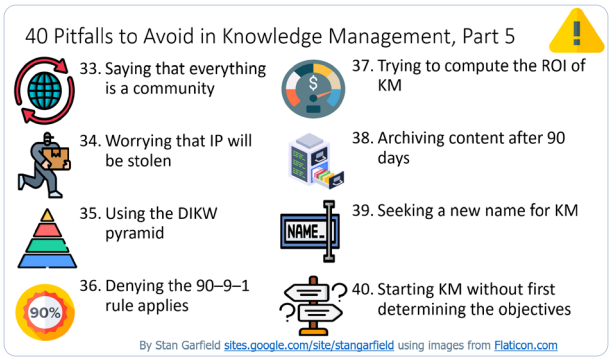
Nick Milton wrote, " 'Knowledge sharing and reuse' is better than 'Knowledge sharing,' but you need to add Knowledge Creation to the list as well, and probably Knowledge Synthesis, and definitely Knowledge Seeking, so by the time you say, 'Knowledge creation and seeking and sharing and synthesis and reuse' you might as well say 'Knowledge management.' Knowledge Management does not imply the management of pieces of knowledge, any more than Time Management means the management of pieces of time. As Etienne Wenger said, 'If by manage we mean to care for, grow, steward, make more useful, then the term knowledge management is rather apt.' "

40. Starting KM without first determining the objectives

I have heard each of the following statements or questions at one time or another:

1. We need to benchmark our competitors and do what they are doing.
2. We need to achieve a higher level in the KM Maturity Model.
3. We need to implement the latest technology solution.
4. Which KM tools should we use?
5. We installed an Enterprise Social Network, and now we need to increase adoption.
6. We need everyone to update their skills profile.
7. We need to collect all documents and put them in a repository.
8. Everyone should start collaborating on our new platform.
9. Everyone should start editing our new wiki and blogging.
10. Everyone should start tagging and rating content.

Without first defining clear business objectives, vision, strategies, and use cases, it is very unlikely that a KM program will succeed. Be sure to define those first, and only then proceed to implement using the 50 KM Components.



Chapter 20: Knowledge Sharing and Reuse

Sharing provides a supply of knowledge and is necessary to allow reuse. Reuse is the other side of the coin and represents the demand for knowledge. You need both to occur regularly for knowledge management to work as intended.

Types of Knowledge Sharing

Shared knowledge is often about how to do something:

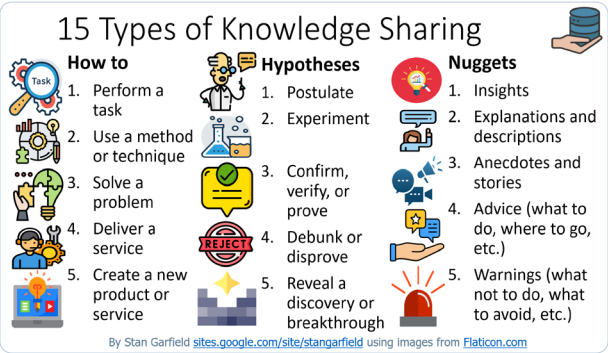
1. Perform a task
2. Use a method, process, or technique
3. Solve a problem
4. Deliver a service
5. Create a new product or service

Hypotheses and theories are another way that knowledge is shared:

1. Postulate
2. Experiment
3. Confirm, verify, or prove
4. Debunk or disprove
5. Reveal a discovery, invention, or breakthrough

Shared knowledge also includes:

1. Insights
2. Explanations and descriptions
3. Anecdotes and stories
4. Advice (what to do, where to go, etc.)
5. Warnings (what not to do, what to avoid, etc.



Why People Don't Share – And Why They Should

To help change an organization's culture from one of knowledge hoarding to one of knowledge sharing, it's important to understand why people may not be sharing their knowledge with one another. There are 16 common reasons why people don't share what they know. Here they are, along with likely causes and recommended solutions for each one.

16 Reasons Why People *Don't* Share Their Knowledge

1. **They don't have time.**
   - *Cause:* They think they have no time for knowledge sharing.
   - *Solution:* Embed knowledge-sharing into the basic work and processes of your organization so that it is not viewed as a separate task which can be avoided.
2. **They don't trust others.**
   - *Cause:* They are worried that sharing their knowledge will allow other people to be rewarded without giving credit or something in return or result in the misuse of that knowledge.
   - *Solution:* Reward people on team goals, and nurture communities within the organization to create an environment of trust. See Pitfall 19 in Chapter 19.
3. **They think that knowledge is power.**
   - *Cause:* They hoard their knowledge waiting for someone to beg them for it, treat them like a guru, or give them something in return.
   - *Solution:* Recognize, reward, and promote those who share their knowledge, while denying promotions to those who fail to do so.
4. **They don't know why they should do it.**
   - *Cause:* Leadership has not made a strong case for knowledge sharing.
   - *Solution:* Have the leader of the organization communicate regularly on knowledge sharing expectations, goals, and rewards.
5. **They don't know how to do it.**
   - *Cause:* They have not received training and communications on how to share knowledge.
   - *Solution:* Regularly communicate and conduct training, webinars, online guided tours, and knowledge fairs. Web-based training and webinar recordings should be available for all tools. See point 2 under Implementation Plans in Chapter 10.
6. **They don't know what they are supposed to do.**
   - *Cause:* Leadership has not established and communicated clear goals for knowledge sharing and has not modeled the desired behaviors.
   - *Solution:* Establish and communicate clear knowledge-sharing goals, and have leaders regularly demonstrate knowledge sharing so others can follow their example.
7. **They think the recommended way will not work.**
   - *Cause:* They have received training and communications but don't believe what they are being asked to do will work.
   - *Solution:* The KM leaders, knowledge assistants, and other members of the KM team have to convince

people in small groups or one-on-one by showing them that it does work.

8. **They think their way is better.**
   - *Cause:* They are used to working on their own or collaborating only with a small group of trusted comrades and believe this is the best way.
   - *Solution:* Regularly share stories of how others are benefiting from sharing knowledge using the recommended ways. This should help sway those stuck in their current ways to consider using better ways.
9. **They think something else is more important.**
   - *Cause:* They believe that there are higher-priority tasks than knowledge sharing.
   - *Solution:* Get all first-level managers to model knowledge-sharing behavior for their employees, and to inspect compliance to knowledge-sharing goals with the same fervor as they inspect other goals.
10. **There is no positive consequence to them for doing it.**
    - *Cause:* They receive no rewards, recognition, promotions, or other benefits for sharing knowledge.
    - *Solution:* Implement rewards and recognition programs for those who share their knowledge. For example, award points to those who share knowledge, and then give desirable rewards to those with the top point totals. See Chapter 21.
11. **They think they are doing it.**
    - *Cause:* They are sharing knowledge differently than the recommended ways (e.g., sending email to trusted colleagues or distribution lists).
    - *Solution:* Assign people to work with each community and organization to show them how to use the recommended ways and how they work better than other ways. Providing a new tool or process that is viewed as a "killer app" – it quickly and widely catches on – is the best way for the old ways to be replaced with new ways.
12. **They are rewarded for not doing it.**
    - *Cause:* They hoard their knowledge and thus get people to beg for their help, or they receive rewards, recognition, or promotions based on doing other tasks.
    - *Solution:* Work with all managers in the organization to encourage them to reinforce the desired behaviors and stop rewarding the wrong behaviors.
13. **They are punished for doing it.**
    - *Cause:* As a result of spending time on knowledge sharing, they don't achieve other goals that are more important to the organization or are chastised for wasting time.
    - *Solution:* Align knowledge-sharing processes and goals with other critical processes and performance goals, and regularly communicate that time spent sharing knowledge is time well spent.
14. **They anticipate a negative consequence for doing it.**
    - *Cause:* They are afraid that if they share knowledge, they will lose their status as a guru (no one will have to come begging to them at the time of need), that people they don't trust will misuse it or use it without attribution, or that they will not achieve other more important goals, They are afraid of asking or answering a question in public because it may expose their ignorance, make them appear incompetent, or subject them to criticism, blame, or embarrassment for sharing something improper or incorrect.
    - *Solution:* Position knowledge sharing as being a critical success factor for the organization. Facilitate ways for people to establish trusting relationships through Enterprise Social Networks and face-to-face meetings. Recognize those who ask, answer, and share in public, and provide ways to ask questions on behalf of others.
15. **There is no negative consequence to them for not doing it.**
    - *Cause:* Knowledge sharing is not one of their performance goals, or it is a goal that is not enforced.
    - *Solution:* Work with all first-level managers to get them to implement, inspect, and enforce knowledge-sharing goals. This needs to come from the top – if the leader of the organization insists on it and checks up on compliance, it will happen.
16. **There are obstacles beyond their control.**
    - *Cause:* They are not allowed to spend time sharing knowledge, they don't have access to systems for knowledge sharing, or they don't have strong English language skills for sharing with those outside of their country.
    - *Solution:* Embed knowledge sharing into normal business processes. Provide ways to collaborate when not connected (e.g., using email for threaded discussions). Encourage those with weak English skills to share within their countries in their native languages.

10 Reasons Why People *Should* Share Their Knowledge

Beyond the solutions listed above for overcoming the barriers to knowledge sharing, it's useful to help people understand the benefits for both the organization and themselves. In addition to the organizational benefits of knowledge sharing listed in Chapter 2, there are personal benefits:

1. Helps you learn: by conducting research, analyzing data, synthesizing multiple viewpoints, and crystallizing ideas
2. Improves your writing and speaking skills
3. Establishes and enhances your personal brand by

showcasing your expertise and aids your career by building a reputation for helping the organization succeed
4. Creates demand for your expertise: increases opportunities for sales, engagements, appearances, publications, etc.
5. Comes back to you in the form of help when you need it
6. Gets others to also share, which may ultimately benefit you
7. Increases your personal morale: people feel better when they can help others
8. Boosts your confidence and strokes your ego: when people ask for your help and then thank you for providing it
9. Strengthens your knowledge and helps you innovate: others can confirm, point out flaws, or improve what you know through collaboration
10. Influences your organization, your field, and the thinking of others

10 Ways to Encourage Reuse

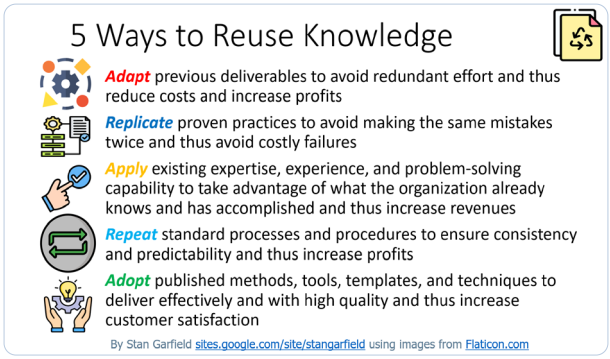
Knowledge management doesn't happen until somebody reuses something. To ensure that it does, here are suggestions for encouraging reuse:

1. Nurture a knowledge-sharing culture in which knowledge reuse is valued over reinvention.
2. Set a goal for reusing content and experience from bids and projects, including sales collateral, proposals, service guides, project documents, and software source code.
3. Ask the following question in individual performance reviews: What content did you reuse in the course of doing your job?
4. Require all project teams to reuse standard, institutionalized knowledge from previous, similar projects.
5. Implement a reuse process for proposals, including a GenAI tool for automatically generating new proposals by reusing boilerplate and cleansed content from previous proposals.
6. Institutionalize the application of lessons learned.
7. Facilitate the replication of proven practices.
8. Measure reuse by capturing the percentage of reuse in proposals and projects, the number of lessons learned applied, and the number of proven practices replicated.
9. Capture the value of reuse by requesting it as part of user surveys.
10. Report regularly on the amount and value of reuse.

5 Ways to Reuse Knowledge

ARARA is an acronym for the five ways that knowledge can be reused:

1. ***A*dapt** previous deliverables to avoid redundant effort and thus reduce costs and increase profits
2. ***R*eplicate** proven practices to avoid making the same mistakes twice and thus avoid costly failures
3. ***A*pply** existing expertise, experience, and problem-solving capability to take advantage of what the organization already knows and has accomplished and thus increase revenues
4. ***R*epeat** standard processes and procedures to ensure consistency and predictability and thus increase profits
5. ***A*dopt** published methods, tools, templates, and techniques to deliver effectively and with high quality and thus increase customer satisfaction



Sharing and Reusing Knowledge by Working Out Loud

Working Out Loud (WOL) is an approach to collaboration in which employees form a virtual network and are encouraged to talk about their work and publish what they do. The goal is to inform others about current projects and to respond, learn, and apply the knowledge of others to their own work. WOL combines **observable work** (creating spaces where others can engage with your content) with **narrating your work** (posting in social software).

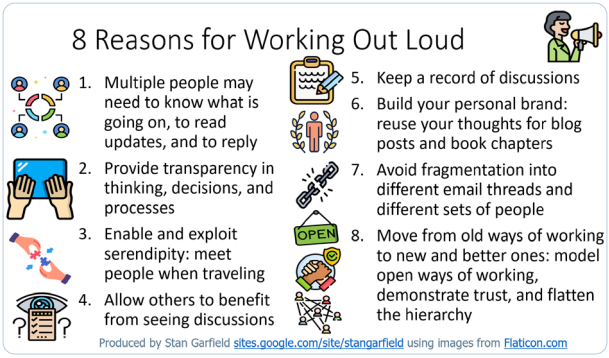
John Stepper has described 5 Elements of WOL:

1. **Relationships:** The path to opportunities and to knowledge is very often via other people. As you deepen relationships with people in your network, they're more likely to help you or collaborate in some way.
2. **Generosity:** Your contributions can include things as simple (and powerful) as recognition and appreciation. The reason generosity is a good way to build relationships is because we're wired for reciprocal altruism. You can make contributions in a way that feels good and genuine knowing that, over the entirety of your network, there will naturally be a benefit to you too as others reciprocate.

3. **Visible work:** When you make your work visible and frame it as a contribution, social platforms can amplify who you are, what you do, extend your reach, and greatly expand the set of contributions you can make and how you can offer them. The feedback on your visible work can also make you and your work better, thus tapping into your intrinsic need for learning.
4. **Purposeful discovery:** Given the infinite amount of contributing and connecting you can do, you need to make it purposeful in order to be effective. As Working Out Loud becomes a habit, you can apply it towards any goal.
5. **Growth mindset:** This is a more open, curious approach to work and life and more resilience in the face of setbacks. Adopting such a mindset means you're more likely to try new things and to persist even when someone, for example, doesn't respond to your contributions as you had hoped.

An open culture of transparency develops trust, provides feedback loops; and spans organizational boundaries. Here are eight reasons for Working Out Loud rather than privately through email messages, or in closed meetings:

1. Multiple people may need to know what is going on, to read updates, and to reply, and you may not know who all of them are. You can receive replies from all relevant people, and see all people who replied, unlike forwarded email.
2. Providing transparency in thinking, decisions, and processes allows you to receive inputs and feedback from anyone willing to contribute. It enables vetting ideas in public by allowing others to weigh in, which helps achieve consensus. And leading by example encourages others to also Work Out Loud.
3. Working Out Loud enables and exploits serendipity. You can meet up with people wherever you are, who otherwise might not know you are going to be there. You can exchange and support ideas with other people attending the same events and allow those unable to attend to also benefit. And you can gain new colleagues by participating in recurring online chats.
4. WOL allows others to benefit from seeing discussions, including receiving advice from unexpected sources based on relevant experience, receiving pointers to useful information, and helping others to learn and develop.
5. You can keep an open record of discussions by maintaining a single thread with all replies in the same place, making it accessible to all who have an interest, and making it easy to refer back to the discussion and to provide a public link.
6. Working Out Loud builds your personal brand. You can maintain a journal of your thinking for a permanent record, reuse your thoughts for blog posts and book chapters, and enhance your reputation as a thought leader.
7. WOL avoids fragmentation into different email threads and different sets of people. There is no need to forward email messages, you can avoid having different people on different threads, and it prevents out-of-sync replies.
8. If you Work Out Loud, you progress from old ways of working to new and better ones. These include modeling the open way of working, demonstrating trust, and flattening out the hierarchy.



People don't always know what will be useful to them until they are made aware of it. When they see it in a feed to which they have opted in, in a newsletter to which they have subscribed, in a notification or alert they have elected to receive, or by monitoring the activity in a community, group, or team space, they can gain useful insights, learn, and otherwise benefit.

Many people are reluctant to ask for help but are thankful if someone shares something they can use. If I waited to receive questions before I shared my knowledge, I would miss out on helping a large number of people. If people seek information using a search engine, and it has not already been shared by posting, publishing, or previously answering queries, they will be unable to find it. And those who neither ask nor search will be out of luck.

A balance between supply and demand is desirable. But if you only wait for knowledge to be sought, and don't have some people who share without being asked, people who never post (about 90% of community members) will be unable to benefit from a large supply of valuable knowledge.

Supply does not mean push. Push means forcing content on people who didn't ask for it. Supply means making it available for those who subscribe, search, or are explicitly mentioned. Sharing without pushing can be done by posting in team spaces, group chats, and communities; by mentioning and tagging; and by reaching those who opt in and subscribe.

The power contained in Working Out Loud is that organizations tend to be insular – they have hierarchies, people communicate only in narrow groups, and email is still prevalent instead of Enterprise Social Networks for more transparent communication. There is lip service given to the idea of using an ESN, but then people revert to their old ways of communicating in small groups. For example, only sending email to people they know and trust because they do not want anybody else to know.

To collaborate effectively, organizations need to move from a need-to-know basis to need-to-share. This is a radical change that many organizations are not ready to embrace. But if people can work more transparently, that can help organizations be much more effective than traditional ways of working.

Chapter 21: How to Motivate Knowledge Sharing

A common concern of knowledge management programs is how to get people to contribute, share, and reuse knowledge. Objections include:

- **I don't have any time.**
- **I don't know what is expected of me.**
- **What's in it for me?**

If people won't spend time sharing, innovating, reusing, collaborating, and learning in the ways promoted by a knowledge management program, it will fail. How can you get people to share and reuse knowledge? Motivating people to demonstrate desired behaviors can be attempted in many different ways, and there is considerable disagreement on the best ways of doing so.

The best way is through inspirational leadership – communicating regularly, setting clear expectations, monitoring performance, regularly thanking and praising, and most important, leading by example. But you can also motivate people through goals and measurements, recognition and rewards, gamification and badging, and positive and negative incentives.

6 of the 16 reasons people don't share knowledge listed in Chapter 20 involve goals, recognition, and rewards:

- *They don't know what they are supposed to do. Solution:* Establish and communicate clear knowledge-sharing goals, and have leaders regularly demonstrate knowledge sharing so others can follow their example.
- *They think something else is more important. Solution:* Get all first-level managers to model knowledge-sharing behavior for their employees, and to inspect compliance to knowledge-sharing goals with the same fervor as they inspect other goals.
- *There is no positive consequence to them for doing it. Solution:* Implement rewards and recognition programs for those who share their knowledge.
- *They are rewarded for not doing it. Solution:* Work with all managers in the organization to encourage them to reinforce the desired behaviors and stop rewarding the wrong behaviors.
- *They are punished for doing it. Solution:* Align knowledge-sharing processes and goals with other critical processes and performance goals, and regularly communicate that time spent sharing knowledge is time well spent.
- *There is no negative consequence to them for not doing it. Solution:* Work with all first-level managers to get them to implement, inspect, and enforce knowledge-sharing goals.

One of the 10 Types of KM strategies listed in Chapter 6 is a Motivation Strategy. Following are details on a number of approaches for motivating desired behaviors.

Definitions

- **Goals:** employee targets included in performance plans and communicated and inspected regularly
- **Measurements:** numerical and visual tracking of performance against goals and operational indicators
- **Incentives:** programs designed to encourage compliance with goals, improve performance against metrics, and increase participation in KM initiatives – includes points, badges, and competitive rankings
- **Recognition:** praise, publicity and promotion
- **Rewards:** financial and tangible awards
- **Gamification:** application of typical elements of game playing (e.g., point scoring, competition with others, rules of play) to other areas of activity to encourage engagement with a process or tool
- **Incentive points tracking:** systems for awarding and tracking points for desired knowledge management behaviors, both automatically as triggered by events and manually through forms entry
- **Badging:** offering validated indicators of accomplishment, skill, quality, or interest that can be earned; digital badges are a visual, short-term reward for completing an action, given to users for performing a certain number of actions of a given type

Goals and Measurements

Each member of the organization should have three simple knowledge-related goals that are easy to remember, straightforward to measure, and consistent with the Top 3 Objectives. You should define personal goals, organizational targets, how employees will be measured, and how progress will be reported.

Once you have defined three basic goals for employees, stick to them for at least a year. Have the senior executive communicate the goals to everyone in the organization. Report progress against the goals in all communication vehicles. Recognize and reward those who exemplify excellence in each goal.

Here are three sets of examples of knowledge goals tailored to individuals.

1. Software Company

1. Contribute a reusable code module to the repository.
2. Publish a white paper.

3. Lead a community of practice.

2. Research & Development Firm

1. Reuse a proven practice.
2. Serve as an expert in the ask the expert program.
3. Submit a lesson learned.

3. Consulting Firm

1. Join a community of practice.
2. Reuse a proposal for a customer.
3. Collaborate using a team space.

Here are examples of how these goals can be measured overall for the organization:

- Contribute a reusable code module to the repository: number of modules submitted; number of unique contributors divided by number of employees.
- Publish a white paper: number of white papers published; number of unique contributors divided by number of employees.
- Lead a community of practice: number of community leaders; number of unique community leaders divided by number of senior-level employees.
- Reuse a proven practice: number of proven practice documents downloaded; reported value of reused proven practices as reported in user surveys.
- Serve as an expert in the ask the expert program: number of participating experts; number of unique experts divided by number of senior-level employees.
- Submit a lesson learned: number of lessons learned submitted; number of unique contributors divided by number of employees.
- Join a community of practice: number of unique community members; number of unique community members divided by number of employees.
- Reuse a proposal for a customer: number of proposals downloaded; number of new proposals with reused content divided by number of new proposals.
- Collaborate using a team space; number of team spaces created; number of unique team space users divided by number of employees.

When communicating the individual goals, spell out what each goal means in detail. Here is an example for a systems integration firm:

We've set individual goals for all of the employees in the company. Everyone should have these goals in their annual performance plans.

1. The first goal is **capture**, which means capturing the content and experience from the bids and projects which we work on. This includes such things as project summaries, lessons learned, proven practices, white papers, bid documents, and project deliverables.
2. Goal number two is **reuse**, which means reusing content and experience from bids and projects, including sales collateral, service guides, project documents, software source code.
3. And the third goal is **participation**, which means being an active member of at least one community and participating in that community's threaded discussions. This means asking questions, answering questions, and otherwise sharing your insights with members of that community.

At the end of the performance review cycle, it's useful to provide a tool for employees to use to gather data to use in their review discussions. It can prompt them to summarize their capture, reuse, and community activities. And it can link to online sources of data to back up their claims.

The following questions can be used as prompts for reviews:

1. Did you have knowledge management goals for this past year? If yes, what where they?
2. How many hours did you charge as KM time during the year, and what were the most important items you produced during those hours?
3. Which communities did you participate in? For each community, were you a leader/co-leader, a frequent contributor, an occasional contributor, or a reader/listener?
4. Which threaded discussions did you subscribe to? How many postings and replies did you contribute during the fiscal year?
5. What content did you submit to repositories?
6. What content did you reuse from repositories?
7. Did you have other significant KM achievements during the year?
8. How did your KM activity benefit you, the organization, and your clients?
9. Are there colleagues whose knowledge sharing helped you and as a result you would like to acknowledge their help for their performance reviews?
10. Are there colleagues who will acknowledge the help you provided to them through knowledge sharing?

Incentives and Rewards

There are several differing schools of thought on whether or not to provide special rewards for desired knowledge behaviors. One school holds that incentives can yield short-term results when introducing a change initiative, but that the effects wear off over time. Another is that people will manipulate such programs to gain the rewards without achieving the desired results (e.g., submit lots of documents with low quality or no reuse benefit). And a third is that you need to provide incentives for people or else they won't do what you want.

It's worth testing these assumptions with pilots for different types of programs. Here are five types of incentives you can try.

1. Performance ratings and salary increases

In conjunction with goals and measurements, you can specify that those who excel in achieving their KM goals will receive higher performance ratings and associated salary increases. Another option is to require that individual KM goals must be achieved in order to receive an above-average rating or increase.

For example, if a firm has three levels of performance ratings – fails to meet expectations, meets expectations, and exceeds expectations – you can specify that only those who achieve their KM goals can receive the highest rating, despite what other great accomplishments they may have. This will likely get everyone's attention.

2. Promotion requirement

For some job types, you can require that knowledge sharing behaviors be consistently demonstrated as a condition of advancement to higher-level positions. For example, technical experts, project managers, and people managers can be held accountable for providing examples of how they shared, collaborated, and innovated using components of the KM environment. If they don't provide such evidence, they are not promoted.

Communications announcing promotions should be widely distributed and should include details on how the individuals shared their knowledge. This will provide examples for others working toward career advancement and give them something to strive for.

3. Tangible rewards

With the approval of your human resources function, you can give money or prizes for the top contributors, top reusers, frequent contributors, frequent reusers, leaders, those who volunteer their time, those who achieve targets, or those selected by leaders or peers. Communicate the rules in advance so everyone will know how to win the awards.

Here are ten examples of different ways to offer rewards:

1. The people who submit the proven practices that are the five most reused will each win a financial reward.
2. The five top project teams in terms of content reused in their projects will be allowed to attend the industry conference of their choice.
3. For every five lessons learned documents contributed that meet quality standards, an individual earns a gift certificate.
4. Those who reuse content as part of three new proposals win the book of their choice.
5. Those who lead a community of practice for one year win the latest in-demand piece of technology.
6. Everyone who participates in a content creation initiative for three months or more wins a subscription to the journal of their choice.
7. All members of a region that achieves its KM goals receive a bonus.
8. Those who receive the top ten most votes from their peers for sharing the most win a weekend trip for two.
9. Those who receive the top ten most votes from their leaders for outstanding knowledge-related behaviors are invited to attend a gala event.
10. Those who receive the top ten most points in competitive rankings (see below) win a financial reward.

The value of rewards does not have to be great in order to motivate people. The desire to compete, earn something free, and be acknowledged as a winner can act as powerful incentives.

People will do a lot in order to win free stuff, even if it is not all that valuable. Tom Evola, who worked for me at Digital Equipment Corporation in St. Louis, enlisted colleagues in helping to proofread brochures that he created. For each error found, he offered to let the finder select the candy bar of their choice from the vending machine, and Tom would pay for it. Despite the fact that the value of a candy bar was small, this resulted in extraordinary efforts to find errors.

In a Seinfeld episode, Elaine buys 24 sandwiches just to earn a free sandwich, even though it is a bad one: People will wait in long lines for free stuff, even if doing so may end up costing more than the value of the free item. For example, people have idled in their cars for hours to get free or low-cost gas, even though the gas they use while waiting costs them more than the value of what they hope to get for free. And people will stay at hotels just for the free breakfast, which is usually jammed with others taking advantage of this benefit, despite the crowds and questionable food quality.

Vanguard used to offer free TurboTax to its Flagship customers, which required maintaining $1 million in assets. Bank of America waives all ATM transaction fees for customers who maintain $50,000 in their accounts. So even though the value of these free services is low relative to the amount of money required to be committed, the appeal of what is free is irresistible to many people.

4. Recognition

Encourage sharing, reuse, and collaboration by recognizing those who perform in the desired ways. Every Thursday, praise your colleagues who share, ask, find, answer, recognize, inform, or suggest in your Enterprise Social Network. If your ESN has a praise function, use it, and tag it as Thankful Thursday. Especially recognize those who are posting for the first time or who were redirected from email to the ESN. See "Recognize and Reward for Desired Behaviors" below for details on recognition.

5. Competitive rankings

Examples of how healthy competition can motivate people:

- When people see where they stand in rankings, they often are motivated to move up in the standings. I used to manage a team of salespeople. After I started producing

a weekly ranking report for the team, every one of them achieved their goals.
- The HP KM Stars program (see details below) resulted in a large number of winners from the UK. They had a friendly competition that frequently yielded monthly winners from the UK.
- The competition does not have to be with other people – it can be against a target such as profile completion percentage. Some people obsess about achieving 100% completion as reflected in a visible badge, and this will yield desired results.

See the sections below for details on how to implement competitive rankings, incentive points tracking, and badging.

Try to combine as many of these five types of incentives as possible. For example, implement a competitive rankings system. Employees can use data from the system during performance reviews. They can submit details from the system when applying for promotions. The top point earners can be given tangible rewards. Those who exceed a targeted point threshold can be recognized as knowledge leaders. And communications vehicles can provide profiles of leaders and interviews with them to share their success stories.

Do Incentives Work?

I have frequently heard that incentives don't work. My own view is different: I think incentive sysems do work, but there is a widespread fear that people will game these systems.

We had a point system that we developed when I was at Hewlett-Packard that awarded points for knowledge-sharing behaviors and, theoretically, it could've been gamed. It would've been easy to game because people received a point for every time they posted in a threaded discussion. We had one person who would tend to post in a discussion with some trivial comment like "great, thanks," just to run up the score, and eventually, I approached that person about that. After that contact he was never seen in the discussions again. It's self-correcting. If people do this in the communities or Enterprise Social Networks, everyone else is going to see it and object to that behavior. In my experience, people gaming the system hasn't proven to be a problem.

Another part of the incentive issue is that intrinsic motivation is more important than extrinsic motivation and that rewards wear out. There was actually a great response when we added an incentive component to HP's point system. I think it's not only because participants could earn some money, which everyone likes to do, but it also signaled the importance of the effort. When they saw that the senior executive was backing up this program financially, they realized, "This must be important. Therefore, I probably should be doing it."

For me, knowledge management incentive programs have worked. IBM and Accenture both implemented programs based on the KM Stars Program developed at HP.

Set Goals and Establish Promotion Requirements

To get people to behave differently, participate in a knowledge management initiative, and share what they know with others, it is helpful to set formal goals and establish requirements for advancement.

Identify objectives for your KM initiative. These will become the basis of the goals you set. An example of the three goals we used at HP:

1. Everyone should be an active member of at least one community of practice.
2. All new projects should be entered into the Project Profile Repository.
3. Before any new project is started, the project team should reuse as much content as possible from previous projects and formal content portals.

When creating annual performance plans, a common problem is defining too many different goals. For a KM program, set three goals that are simple, fundamental, and measurable. These goals should be tied to the most important objectives of the organization.

Consistently communicate and leverage the three goals. Any communication or new initiative should be tied to one or more of the three established goals so employees will clearly see the connection. Prepare and distribute a monthly metrics report that shows performance on all three goals and by whatever organizational views are most appropriate.

Recognize and reward those who achieve the goals. Send them letters from the most senior executive, copying the senior management team and their management hierarchy. Solicit stories from those who achieve their goals on how they did so and distribute these to the entire organization. Publish the names of everyone achieving the goals, and if you use a points system, publish the rankings to showcase the top point winners.

Require that employees who wish to be promoted must demonstrate that they have consistently achieved their KM goals, shared their knowledge, and set a good example for others. Regularly and widely communicate this.

At HP, the Technical Career Path and the Project Management Career Path required that in order to be promoted to the highest possible levels, individuals had to provide evidence of how they had shared their knowledge. Those who could not do so were not promoted. Stories of those who were denied promotions because of this requirement were spread throughout the organization and helped support the formal goals.

Recognize and Reward for Desired Behaviors

Another way to motivate people is a formal recognition and rewards program. Benefits include:

- Making explicit which behaviors are desired.

- Demonstrating that the leaders of the organization view the program as being significant.
- Providing concrete benefits to those who demonstrate the desired behaviors.

Incentives don't have to cost anything to be effective. Just knowing that you have earned the attention, respect, and admiration of others, especially senior leaders, can be very gratifying. And you are more likely to repeat desired behaviors if you know that important people will take notice.

Among the ways to provide non-financial recognition are personal notes from leaders who notice contributions, newsletter articles about those who achieve success in using KM processes, success stories posted to websites, invitations to attend prestigious events hosted by the senior executive, scheduling time with senior technical leaders for exchanges of ideas, and being praised and asked to talk about their efforts in calls or meetings.

To take advantage of the competitive nature of many individuals, an incentive points system can be implemented to award points for desired behaviors, rank those earning points, and report on weekly, monthly, yearly, and lifetime standings. The points awarded can be used for recognition, tangible rewards, or for demonstrating achievement of goals for performance reviews and promotions. The point totals and rankings can be reported on websites, in newsletters, and via messages to employees and managers.

Each desired task has assigned to it a certain point value, which is granted automatically as a result of performing that task. The points earned are displayed on a website to create a friendly competition among all users. They can visit the site to see how they stack up against their peers, the idea being to create some fun, to show that people are in fact spending some of their time on KM, and to recognize them for that.

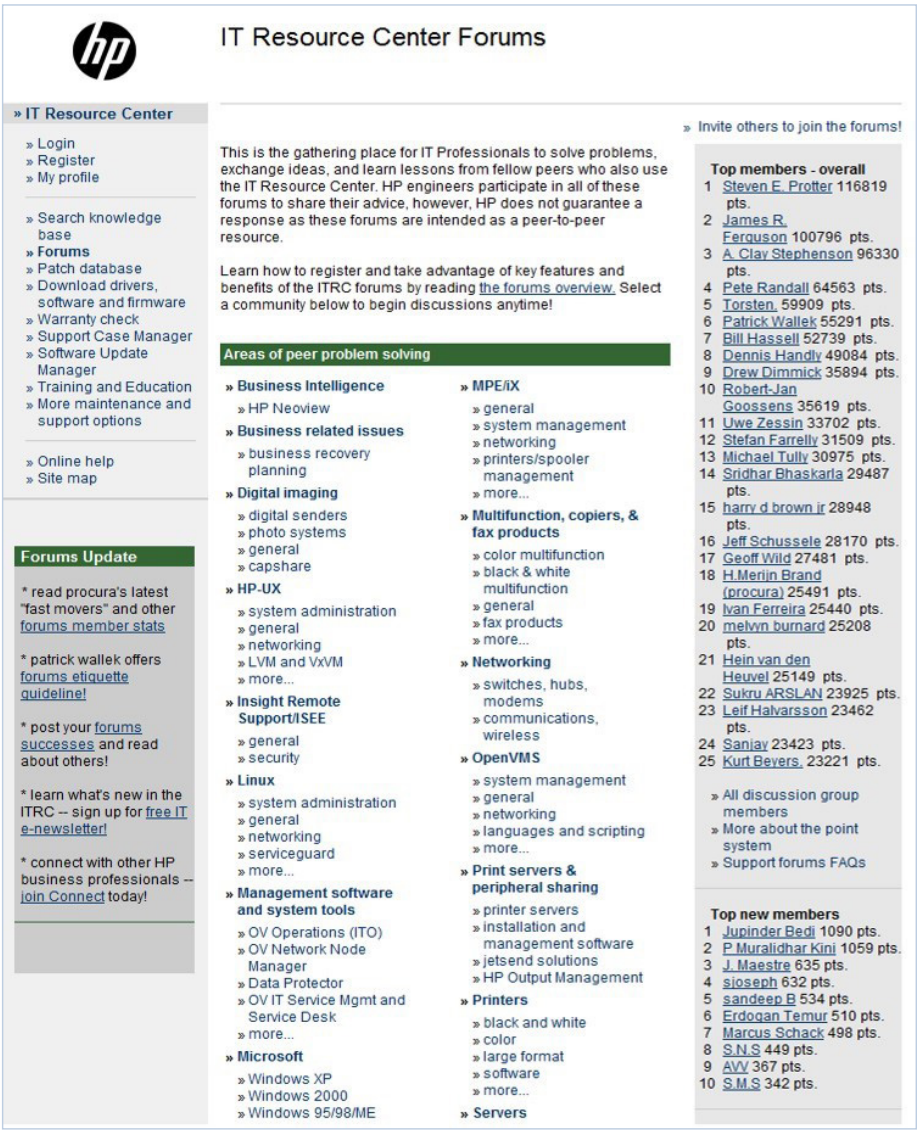
For example, points can be granted for the following:

- Contributing a document to a knowledge repository.
- Posting or replying to a threaded discussion
- Posting a story on the benefits of reusing content from a knowledge repository or a threaded discussion

Make sure that the tasks match the goals of your knowledge management program. If your goals are to increase document contributions, threaded discussion posts, and stories of successful content reuse, then assign points accordingly.

Employees can use data from the system during performance reviews. They can submit details from the system when applying for promotions. The top point earners can be given tangible rewards. Those who exceed a targeted point threshold can be recognized as knowledge leaders. And communications vehicles can provide profiles of leaders and interviews with details on their success stories.

You can use a points system with or without rewards. An example of one without rewards was HP's IT Resource Center (ITRC) Forums that offered a points tracking system to recognize those who shared their knowledge. The "Submit Points" option allowed members to rate replies to their questions by assigning points to those members who provided replies or solutions to problems. On the website, the Top 25 members and the Top 10 new members were listed prominently, and this helped encourage members to help each other and award points as a result.



Another example was the KM Stars program used at HP to track points and create rankings (see details below). Other companies, including Accenture, Cisco, and IBM, implemented similar programs.

If you tie tangible or financial rewards to the system, here is an approach you can try. Each month, select three winners to receive a reward, e.g., a gift certificate, book, or payment.

Criteria can include:

- A winner from three different geographic regions.
- The participants with the top three point totals (but establish a rule that participants can only win once during any 12-month period).
- A winner in each of three categories matching the goals of your KM program, for example:
  - Top document contributor
  - Top threaded discussion answer person
  - Best reuse story author

Have the most senior leader possible announce the winners each month. Before sending the rewards to the winners, ask them to first write a brief story (at least two or three paragraphs) about the activities they performed in order to win the award. Publicize these stories widely.

Negative Consequences

There is also a possible negative side of recognition. People may think:

- Why didn't I get listed in the rankings?
- Why does someone else always get rewarded?
- I can't win, so why should I bother?

To address these possible reactions, look for ways to ensure a diverse set of people are recognized and rewarded. For example:

- People can only win once.
- Include both quantitative and qualitative factors when selecting winners, including location, organization, and unusually deserving circumstances.
- Create multiple categories for winning, including the most points, the biggest improvement, the most creative, newcomer-of-the-month, against all odds, etc.

The Power of Pull

If you have to ask people to do something (e.g., complete their skills profile), rethink your approach to make it attractive. In other words, change it from push (you must do this) to pull (you will want to do this). Here are a few examples.

If you announce that something will only be available for a limited time, in a limited amount, or the cost will go up at a specified date, people will have an incentive to take immediate action.

Google has released tools that are only available by invitation, for example Google Wave, Google Buzz, and Google+. When this happened, there was a clamor by many people trying to get others to send them one of their limited number of invitations.

If you want someone to join and participate in a task force, instead of assigning them to it, or pleading with them, award them an exclusive designation such as Black Belt, Green Belt, or MVP. Now they will feel as though they are being recognized rather than victimized or exploited.

Travel providers and credit card issuers have long used tiered levels of privilege to confer status to their offerings. For example, silver/gold/platinum/diamond and elite/preferred/premier. To earn these exclusive designations, people will consume the offerings in greater amounts, e.g., fly just one airline, stay at just one hotel chain, use just one rental car agency. They will pay extra fees, e.g., higher annual credit card fees. Or they will maintain a higher balance in their accounts to receive preferred benefits.

Negative Incentives

Putting a scare into people gets their attention and will frequently motivate them to take a desired action. Here are a few examples.

If you send out a notice requesting people to take an action, many will ignore it. But if you state that if they fail to act, a specific negative consequence will result, you will get their attention. For example, if you send a message to all ESN group admins stating that inactive groups will be deleted, many of them will contact you to plead their case for retaining their group, even if their group is active and is not at risk of being deleted. The mere mention of possible deletion motivates them to respond and may motivate others to take action to get their groups to be active.

In the early days of Internet humor mailing lists, one such list threatened subscribers with a tongue-in-cheek $5 fee if they unsubscribed. Despite the fact that this was actually impossible to accomplish, it generated a high volume of worried replies.

Whenever the topic arose of how to retire team spaces that are no longer in use, or how to reduce the amount of storage consumed by such sites, I suggested that a bill for storage used be sent out to all site owners. Even if the bill is for a token amount, e.g., $25, many people will respond to such a bill by asking how to avoid the charge. So even if you have no way of actually collecting the money, and do not intend to even try to collect it, the effect of such a bill will cause many people to delete their sites, inform you that the sites are no longer needed, or ask how to reduce their storage to a minimum. This is the flip side of the appeal of free stuff – when there is no perceived charge for something, people don't worry about it, but once it is perceived as no longer free, they will jump through hoops to avoid a charge.

For communities, you can produce regular reports including a list of specific elements with a rating for each (e.g., **green**/**yellow**/**red**). When you distribute the reports, Include the executive sponsors for each community. If they see that their community is shown as **red**, they may instigate corrective action to avoid public shame. Here is an example of the one we produced at Deloitte:

Overall Health Indicator:

- **Green** - 3 Green and 1 Yellow (or better) Health Indicators
- **Yellow** - No more than 1 Red Health Indicator
- **Red** - 2+ Red Health Indicators

Health Report

Domain	COP Name	Discussion Board	Newsletter	Meeting	Membership	Overall Health
Strategy & Operations	Finance	Yellow	Green	Green	Green 383	Green
Technology - TI	Functional & Test Community	Green	Green	Green	Green 616	Green
Human Capital	HR Transformation	Green	Green	Green	Green 489	Green
Human Capital	Leadership Development and Strategy	Green	Green	Green	Green 184	Green
Human Capital	Learning & Talent Development	Yellow	Green	Green	Green 363	Green
Technology - TI	Oracle BI	Green	Green	Green	Green 295	Green
Technology - TI	SharePoint community	Green	Green	Green	Green 456	Green
None	Social Media Community	Green	Yellow	Green	Green 633	Green
Human Capital	Technology Adoption	Yellow	Green	Green	Green 193	Green
None	As One	Red	Red	Yellow	Green 321	Red
Strategy & Operations	Clinical Information Systems	Red	Red	Green	Green 149	Red
None	Deloitte Analytics	Red	Red	Red	Yellow 51	Red
Strategy & Operations	Global Consulting Finance Transformation	Red	Green	Red	Yellow 85	Red
Human Capital	Health Actuarial Community	Red	Red	Green	Yellow 57	Red
Technology - TI	Java	Red	Green	Red	Green 185	Red
Technology - TI	Lean IT	Yellow	Red	Red	Green 127	Red
Technology - TI	Mobile Computing	Yellow	Red	Red	Green 278	Red
Technology - EA	Oracle Technology Capability	Red	Yellow	Red	Green 167	Red
Technology - TI	Playbook Method User Community	Red	Yellow	Red	Green 133	Red
Technology - EA	SAP Communities of Excellence	Red	Red	Green	Green 519	Red
Strategy & Operations	Service Operations Excellence	Red	Red	Red	Green 113	Red
Strategy & Operations	Service Operations Excellence (SOE) - Provider	Red	Red	Green	Yellow 52	Red
None	Sourcing and Procurement	Red	Red	Green	Green 124	Red
Technology - TI	Systems Integration	Green	Red	Red	Yellow 53	Red
None	Cloud Computing	Green	Green	Red	Green 1165	Yellow
Strategy & Operations	Core Banking	Red	Green	Yellow	Green 215	Yellow
None	Customer Transformation	Red	Green	Green	Green 274	Yellow
Strategy & Operations	Infrastructure Operations	Red	Green	Green	Green 104	Yellow
Technology - TI	IT Service Management	Yellow	Yellow	Red	Green 138	Yellow
Strategy & Operations	M&A and Restructuring	Red	Yellow	Green	Green 244	Yellow
Strategy & Operations	Manufacturing Operations	Red	Yellow	Green	Green 116	Yellow
Technology - TI	Microsoft Community	Yellow	Yellow	Yellow	Green 372	Yellow
None	Oil & Gas Consulting	Yellow	Yellow	Green	Green 132	Yellow
Strategy & Operations	Product Development	Yellow	Red	Green	Green 185	Yellow
Technology - TI	Pursuit Community	Yellow	Yellow	Green	Yellow 90	Yellow
Technology - EA	RunSAP	Yellow	Green	Yellow	Green 253	Yellow
None	Specialist Community	Red	Green	Green	Green 122	Yellow
Strategy & Operations	Strategy	Yellow	Green	Green	Yellow 554	Yellow
Technology - EA	Technology FT Certification	Yellow	Yellow	Yellow	Green 117	Yellow
Technology - EA	User Experience	Yellow	Red	Green	Green 274	Yellow

Deloitte's Communities Health Report

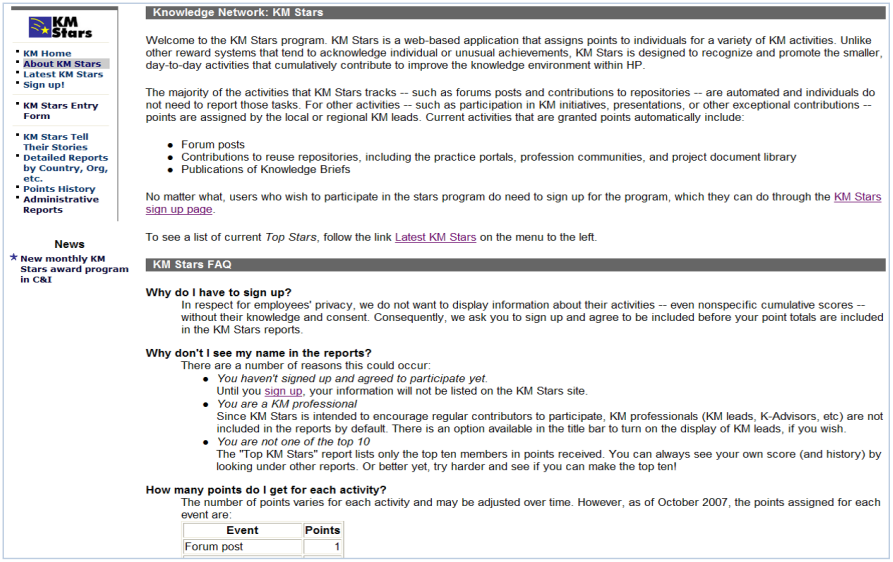
Gamification

When I was at HP, I worked with Andrew Gent to create the HP KM Stars Program. Here are the details.

We started with contribution and reuse:

- 5 points for joining a community
- 1 point for posting to a threaded discussion
- 5 points for contributing a document
- 10 points for publishing a knowledge brief
- 5 points for filling in the reuse form

When no one filled in the reuse form, we removed reuse from the points list. We replaced it by creating an online threaded discussion called the Reuse Stories Forum and encouraged people to post stories about how they benefited from reusing knowledge. Every month we selected one contributor who had posted such a story to be recognized as one of four monthly KM Stars.



HP's KM Stars Site

We started with recognition only, emphasizing rankings and publicity on the KM intranet site, in the monthly KM newsletter, and in the KM blog. Later, we added financial rewards. We selected three winners per month initially, and then four when the Reuse Stories Forum was added. Each winner was required to write a story on how they became a KM Star in order to receive their reward.

We widely publicized the winners each month. The senior executive sent messages to the winners, copying the leadership team and the winner's management chain of command. A lively competition ensued, especially in the UK. We observed just one instance of gaming the system, which was addressed successfully. We added the KM Stars points to everyone's personal profiles.

Badging

Here are examples of badges that can be given to people based on qualitative or quantitative factors.

Assigned Badges

1. **Contributor** – based on contributions to knowledge repository
2. **Innovator** – based on suggestions made in ESN and participation in innovation challenges

3. **Recycler** – based on downloading and reusing knowledge repository content
4. **Collaborator** – based on participation in ESN
5. **Learner** – based on completion of learning activities
6. **Expert** – based on keeping skills profile updated and responding to questions in ESN

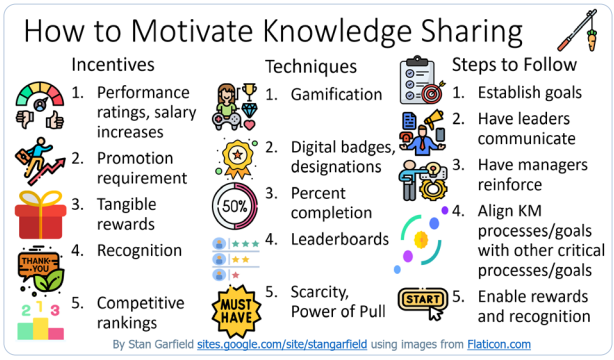
Levels for each badge

1. Bronze – some activity
2. Silver – moderate activity
3. Gold – frequent activity
4. Platinum – extensive activity
5. Diamond – exceptional activity

Earned Badges

- **Connector:** based on people connections
- **Influencer:** based on ESN Influence metric, a quantitative measurement of an individual person's overall impact on our network and ability to encourage others to interact using the following factors:
    1. Number of posts by the person
    2. Number of followers for the person
    3. Number of direct replies to posts by the person
    4. Number of posts in conversations started by the person
    5. Number of likes received by the person's posts
    6. Number of distinct people who have liked a post by the person
    7. The ratio of likes / post by the person
    8. The ratio of likes / liker for posts by the person
    9. Average lifespan of a conversation by the person
- **Maven:** based on votes
- **ESN leader:** based on
    1. ESN actions liked
    2. Replies
    3. Posts
    4. Most-replied-to conversations
    5. Conversations with the most participants
    6. Followers
    7. Times praised
- ***SAFARIS*** Star: for ESN use
    1. ***Share*** – 1 point for each post sharing information, 2 points for each like or reply to such a post
    2. ***Ask*** – 2 points for each post asking a question
    3. ***Find*** – 2 points for each post finding a resource
    4. ***Answer*** – 5 points for each post answering a question, 5 additional points if the person asking the question acknowledges that the answer provided was helpful
    5. ***Recognize*** – 1 point for praising someone, 5 points for being praised by someone else
    6. ***Inform*** – 1 point for each post informing about activities, 2 points for each reply to such a post
    7. ***Suggest*** – 1 point for each post suggesting an idea, 10 points for each idea implemented by someone
- ***CIRCLE*** of Excellence: for overall knowledge management behaviors

1. ***Contributor*** – 5 points for each knowledge repository contribution, 10 points for each content rating of such a contribution (made by someone other than the contributor) with 3 or more stars
2. ***Innovator*** – 2 points for each innovation challenge contribution
3. ***Recycler*** – 5 points for each content rating for someone else's knowledge repository contribution
4. ***Collaborator*** – 5 points for joining an ESN group (one time per group), 5 points for turning on email notifications for a group (one time per group)
5. ***Learner*** – 10 points for attending a KM-sponsored training event, 5 points for completing a self-paced instruction course
6. ***Expert*** – 2 points for updating skills profile, 10 points or serving as a designated subject matter expert



Chapter 22: How to Show the Value of KM

The subject of how to compute the return on investment for knowledge management, Enterprise Social Networks, collaboration, and social media has been around since the start of each of these fields. My view is that it is important to define and communicate the benefits of these programs, and measure and report on progress, but that proving ROI should not be the point.

It's possible to compute the ROI of a narrowly defined project requiring capital investment, such as building a new plant or buying a new piece of equipment. But for broader programs which integrate people, process, and technology components, and work with other broad programs such as learning, talent development, and finance to improve the effectiveness of the organization, ROI is ill-suited.

"What will be the ROI of your KM program?" is the wrong question. Better questions include:

1. Why should we implement a KM program?
2. What are the benefits?
3. How will it help our organization accomplish our key objectives?
4. How will our organization improve as a result?
5. How will our people's needs, opportunities, and challenges be met?

Do we ask what the ROI is for the human resources or finance departments? What about the ROI for the email or intranet?

For example, if we were to eliminate the HR department because its ROI is too low, what might happen? Here are three potential problems which could arise by leaving personnel administration to the individual managers:

1. Wrongly classifying certain employees as exempt from the Fair Labor Standards Act and, thus, ineligible for overtime pay
2. I-9 form mistakes
3. Messy firings - the biggest cause of employee lawsuits

Having trained professionals in the HR department can help avoid these and many other costly errors. But computing the ROI on preventing lawsuits is not possible.

So what should we do instead of focusing on ROI?

1. **Make a logical case for how the initiative will help achieve the key business objectives of the organization.** For example, if the Top 3 Objectives are increasing profits, accelerating sales, and improving customer satisfaction, explain how the elements of the program will have a positive impact on these. If profits increase, sales accelerate, and customer satisfaction improves, and there is a rational explanation for how knowledge management supported these results, then take partial credit. On the other hand, if the business results are not achieved, then the fact that KM did well will not likely be well-received. You can try to argue that things would have been even worse without KM, but that would be a hollow victory.

2**. Establish a plausible scenario and then extrapolate the benefits**. For example:

- If we save one project from repeating the same mistakes as previous projects, that could save $2 million, which will more than pay for the program. If we repeat this, the impact on profits is very large.
- If by responding quickly to an opportunity with a proven solution using acknowledged experts, we win one $10 million project that we otherwise would have lost, that's incremental revenue of $10 million. If we repeat this, the impact on revenue is very large.
- If by ensuring that the best engineering product knowledge is reused, we avoid one product recall, we save the company hundreds of millions of dollars.

This type of business case can be very persuasive. Note, though, that it is not a strict ROI analysis. You can't prove that the sole cause of any outcome was KM, and you can't prove that a costly recall was avoided if it never happened. But you can point out that the probabilities of positive outcomes are significantly increased through KM.

3. **Choose the most relevant benefits from the list of 15 benefits** in Chapter 2 and ask the program sponsor to confirm that these are the right ones. Tailor your efforts to achieve these desired benefits.

4. **Define the most painful problems that knowledge management can help prevent**, such as:

- Product recalls
- Injuries or deaths
- Harm to the environment
- Lawsuits
- Unprofitable products and services
- Low employee morale
- Lost customers
- Damage to the brand
- Inability to attract or retain talent

- Failure to achieve the organization's mission
- Diminished productivity, revenue, growth, profit margin, market share, and shareholder value
- Becoming a takeover target or going out of business

5. Before launching a program, **tell stories** that show the value it will provide. After the program starts, tell stories of early success, As the program matures, document wins using the voices of actual users.

6. Define relevant metrics for all stated objectives, and report regularly on performance against those metrics. Pair operational metrics with business impact metrics and correlate good performance in the KM program with good results for the business. **Measure the benefits of your KM efforts**.

7. **Make a sound business case.** For example:

- Do we want our people to be able to readily find deliverables from previous projects so that they can reuse them, and people who can provide useful advice on how to deliver the next one?
- Do we want anyone who has a question, seeks a resource, or requires help to be able to easily, quickly, and reliably get what they need?
- Do we want to avoid redundant effort, repeating the same mistakes over and over, and keeping important information from reaching the very people who need it?
- Do we want to stop making poor decisions, failing to innovate, and losing our organizational knowledge as people resign and retire?

8. Work with analytics experts, statisticians, and academicians to **produce correlations between desired knowledge-sharing actions and desired results**, including employee advancement, project success, and financial results. For example, Kai Riemer of the University of Sydney published a paper that states "a range of empirical studies in organizations have shown that this type of social capital (online collaboration) is associated with better individual performance evaluations, greater promotion chances and higher compensation payments as well as an increased team performance"

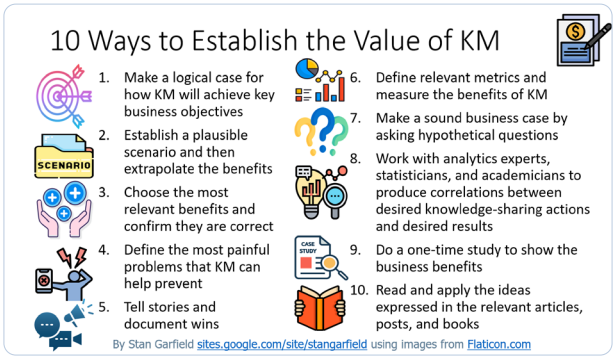
9. **Do a one-time study to show the business benefits**. Caterpillar commissioned a one-time study by an independent consulting firm to identify the benefits and ROI for two established communities of practice: Joints and Fasteners and Dealer Service Training. The results were:

- Qualitative ROI: Productivity (up 40%), Cost (reduced 25%), Speed (up 15%), Quality (up 4%)
- Tangible ROI: 200% for internal CoPs; 700% for external CoPs

Based on these results, the Caterpillar KM program was justified. There was no need for ongoing collection and reporting of ROI, since it had been done once.

10. **Read and apply the ideas** expressed in the articles, posts, and books on this subject. In particular:

- *The Value of Knowledge: The Economics of Enterprise Knowledge and Intelligence* by Timothy W. Powell
- *Measuring the ROI of Knowledge Management 2nd edition* edited by Edward Bowes
- The links in "KM's not dead, but talking about its ROI should be" (linkedin.com/pulse/kms-dead-talking-its-roi-should-stan-garfield)



There is a broader argument to be made for the value of knowledge management. In "ROI: the Sad Case for KM," my former HP colleague, Andrew Gent, wrote:

More and more frequently I hear calls for proof of the ROI of knowledge management. I hear it within my own company; I hear it from KM practitioners in other companies; I even hear KM consultants espousing the importance and benefits of calculating ROI to demonstrate knowledge management's contribution to the business bottom line. This concerns me. Not because I don't believe KM has value – it obviously does! – but because ROI is a specific type of business measurement that overemphasizes the direct-to-bottom-line component of KM while completely ignoring (and discrediting) the rest. KM certainly contributes indirectly to the bottom line, as it contributes to many other aspects of the company's fiscal and intellectual diversity and health. But that is not its primary goal. This call for ROI is part of a larger tendency within corporations to "align" KM with business operations. By that I mean making KM a tool used by business management to ensure the optimal and efficient exercise of business processes.

Now, I have no objections to KM supporting business processes. Clearly, that is the primary use of knowledge and the company wants to encourage anything that contributes to the bottom line. But that is not all that KM is about. KM also significantly contributes to the breadth of knowledge, experience, and expertise of its employees. It contributes to the resilience and responsiveness of the company to changes in the business environment by strengthening its core intellectual capabilities. It impacts business processes, both direct and indirect. And it establishes a culture and channels for distributing business intelligence at lightning speed. The problem is the measuring. Managers don't measure things for intellectual stimulation. They measure them so they can make changes and confirm the results. Managers also tend to think high-level. If ROI is what you are measuring, then that is the

goal (not a goal, the goal). That is not a slam against managers, it is just an attribute of their job: to think clearly and succinctly and not get bogged down in details.

The results, if you are not careful, can be both dramatic and unfortunate. The analogy that comes to mind is college. If you see the goal of college being to get a job (your ROI), then there really is no need for English, history, languages, or even science – depending upon your target profession. However, if you see the goal of college as expanding your knowledge and broadening your character, not only will it have a strong indirect impact on your employability, but your opportunities will be far more flexible and adaptive to the business environment when you graduate. Business opportunities fluctuate on a cyclic basis. So just as the goal of college is to teach capabilities, not specific skills; the goal of KM is to facilitate knowledge development and transfer, not solely to apply knowledge to the product pipeline.

The success or "return" of a KM program is the cumulative benefits – both short and long-term on the company and its employees. This is a very hard concept for line-of-business managers to grasp. They understand it when they feel its absence – the rebirth of KM within American companies runs a parallel course to the enthusiasm for the business fads of downsizing, rightsizing, and outsourcing in the late 80s and 90s. Many companies followed the trend only to find that the intelligence of the corporation had left with its employees. The need for knowledge management became apparent. I believe it is the responsibility of KM professionals to avoid the rush to ROI and make sure both the direct and indirect "returns" of KM are recognized and re-established as objectives.

Chapter 23: How to Build Expertise in KM

I am often asked how to develop expertise in knowledge management. As with most fields, there are no shortcuts to becoming an expert. You have to read, write, listen, attend training and events, and interact with others in the field. But mostly, you need to practice the profession by actually doing the work of knowledge management. Here are 10 ways to build expertise in KM.

1. Assess yourself against the list of 100 KM Specialties.

If you were asked to meet with a client as an expert in the specialty, would you be comfortable doing so? Would the client be pleased following the meeting? Choose one or more specialties in which you are an expert or you would like to become an expert. Focus your development on those specialties

100 KM Specialties

1. **Sharing:** allowing someone else to use something that you have — what you have learned, created, or proved — so that others can learn from your experience and reuse what you have already done
2. **Culture:** the way things are done in an organization, and what things are considered to be important and taboo
3. **Organizational design:** the alignment of structure, process, rewards, metrics and talent with the strategy of the business
4. **Change management:** developing a planned approach to change in an organization to address anticipated obstacles and to ensure successful adoption
5. **Innovation:** the process by which an idea is translated into a good or service for which people will pay
6. **Invention:** a unique or novel device, method, composition or process
7. **Creativity:** imaginative behavior characterized by originality and expressiveness
8. **Idea generation:** the creative process of generating, developing, and communicating new ideas, where an idea is understood as a basic element of thought that can be either visual, concrete, or abstract
9. **Reuse:** using an item again after it has been used once — in particular, what others have already learned, created, and proved — in order to save time and money, minimize risk, and be more effective and efficient
10. **Proven practices:** selecting, documenting, and replicating processes that have proven to improve business results so that others in similar environments or with similar needs can benefit from the proven successes
11. **Lessons learned:** explaining what an individual or team has learned as a result of their experience, using documents, presentations, discussions, and recordings — including what they tried, what worked, what didn't work, what to do, what to avoid, problems faced, how problems were solved, what they would do differently, and key insights and nuggets
12. **Knowledge retention:** methods of capturing or maintaining access to the knowledge of workers leaving an organization due to new jobs, retirement, promotion, relocation, and role changes; temporary work, contracting, consulting, and outsourcing; mergers, acquisitions, consolidations, and reorganizations; changes in strategy, focus, or specialty; workforce reductions; short-term job mentality; disillusionment; death, illness, and care giving
13. **Collaboration:** interacting with peers and colleagues to exchange ideas, share experiences, work together on projects, and solve problems
14. **Communities:** groups of people who share a concern, a set of problems, or a passion about a topic, and deepen their understanding and knowledge of this area by interacting on an ongoing basis
15. **Learning:** the act of gaining knowledge from others, from existing information, and by doing
16. **Competency development:** define the competencies employees need to develop to improve performance in their current job or to prepare for other jobs via promotion or transfer; plan and implement
17. **Training:** classroom courses, self-paced courses, and recorded webinars that allow users to learn what is expected of them; the people, processes, and tools available to them; and how to use all of these in order to learn, share, reuse, collaborate, and innovate
18. **Goals:** employee targets included in performance plans and communicated and inspected regularly
19. **Measurements:** numerical and visual tracking of performance against goals and operational indicators
20. **Incentives:** programs designed to encourage compliance with goals, improve performance against metrics, and increase participation in KM initiatives — includes points, badges, and competitive rankings
21. **Gamification:** application of typical elements of game playing (e.g., point scoring, competition with others, rules of play) to other areas of activity to encourage engagement with a process or tool
22. **Recognition:** praise, publicity and promotion
23. **Rewards:** financial and tangible awards
24. **Social Networks:** collections of people who are acquainted or connected as friends, business contacts, or colleagues and communicate, collaborate, or help one another as needed

25. **Organizational networks:** informal networks of personal relationships, rather than the formal organization structures –the network behind the org chart
26. **Value networks:** the natural way that work gets done — any set of roles and interactions that generates a specific kind of business, economic, or social good; value network modeling provides a human-centric, role-based, network view of any business activity
27. **Network analysis:** mapping and measuring of relationships and flows between people, groups, organizations, animals, computers or other information/knowledge processing entities; the nodes in the network are the people and groups while the links show relationships or flows between the nodes — provides both a visual and a mathematical analysis of human relationships
28. **Expertise location:** finding experts on particular subjects by searching explicitly for, or otherwise being made aware of, all people in an organization having desired skills, experience, or knowledge
29. **Personal profiles:** online tools which allow individuals to enter details about who they are, where they are, what they know and can do, and their affiliations — and which aggregate their contributions, social media posts, and other activities in order to provide others with a comprehensive, searchable view
30. **Communications:** vehicles for informing current and potential users about news, progress, functionality, success stories, documentation, and instruction using multiple channels (online, email, audio, video, etc.)
31. **Facilitation:** the process of designing and running a successful meeting, serving the needs of any group (decision making, problem solving, knowledge sharing, knowledge elicitation, innovation, etc.)
32. **Knowledge transfer:** methodical replication of the expertise, wisdom, and tacit knowledge of critical professionals into the heads and hands of their coworkers; planned movement of the right skills and information at the right time to keep a workforce prepared, productive, innovative, and competitive
33. **User support:** people who provide support by phone, email, chat, or social media to users, including consulting on tools, finding content, connecting to knowledge sources, and supporting processes
34. **Knowledge-Centered Service** (**KCS**): a methodology and a set of practices and processes that focuses on knowledge as a key asset of the customer/technical support organization
35. **Content management:** creating, managing, distributing, publishing, and retrieving structured information — the complete lifecycle of content as it moves through an organization
36. **Document management:** tracking and storing electronic documents and/or images of paper documents, keeping track of the different versions modified by different users (history tracking) and archiving as needed
37. **Records management:** maintaining the records of an organization from the time they are created up to their eventual disposal; this may include classifying, storing, securing, archiving, and destroying records
38. **Analytics:** discovery and communication of meaningful patterns in data
39. **Text analytics:** analyzing unstructured text, extracting relevant information, and transforming it into useful business intelligence
40. **Visualization:** techniques for creating images, diagrams, or animations to communicate a message
41. **Metrics:** indicators on performance and activity
42. **Reporting:** collecting, publishing, and distributing metrics and producing reports to communicate performance against goals, areas for improvement, and progress toward the desired state
43. **Project management:** the discipline of planning, organizing, securing, managing, leading, and controlling resources to achieve specific goals
44. **Process management:** the application of knowledge, skills, tools, techniques and systems to define, visualize, measure, control, report and improve processes
45. **Agile development:** a set of principles in which requirements and solutions evolve through collaboration between self-organizing, cross-functional teams; promotes adaptive planning, evolutionary development, early delivery, and continuous improvement, and encourages rapid and flexible response to change
46. **Workflow:** embedding knowledge creation, capture, and reuse in business processes so that these steps happen routinely as part of normal work; software which connects and sequences different applications, components, and people, all of which must be involved in the processing of data to complete an instance of a process
47. **Planning:** the process of thinking about and organizing the activities required to achieve a desired goal, including the creation and maintenance of a plan
48. **Decision making:** mental processes resulting in the selection of a course of action among several alternative scenarios; produces a final choice that is an action or an opinion
49. **Checklist:** job aid used to reduce failure by compensating for potential limits of human memory and attention; helps to ensure consistency and completeness in carrying out a task
50. **Knowledge audit:** formal determination and evaluation of how and where knowledge is used in business processes; identifies implicit user needs and explicit information stores to evaluate all information resources and workflows, and determine enterprise user access requirements; rigorous process using questionnaires, interviews and resource descriptions
51. **Knowledge mapping:** presenting what knowledge resides where (e.g., people, media, organizational units, or sources of knowledge outside the organization) and demonstrating the patterns of knowledge flow
52. **Knowledge modeling:** process of creating a computer-interpretable model of knowledge or standard specifications about a kind of process, facility, or product; cross-disciplinary approach to capture and model knowledge into a reusable format for purpose of preserving, improving, sharing, substituting, aggregating and reapplying it

53. **Peer assist/retrospect:** peer assist - bringing together a group of peers to elicit feedback on a problem, project, or activity, and to draw lessons from the participants' knowledge and experience; retrospect - structured and facilitated knowledge capture meeting at the end of a project, involving as many of the project team as possible; quick and effective way of capturing knowledge before team disbands; if a member from the next team to undertake a similar business challenge participates in the discussion, a retrospect for one team can serve as a peer assist for the next
54. **After Action Review (AAR):** structured review or debrief process for analyzing what happened, why it happened, and how it can be done better by the participants and those responsible for the project or event
55. **Sensemaking:** process of creating situational awareness and understanding in situations of high complexity or uncertainty in order to make decisions; a motivated, continuous effort to understand connections (which can be among people, places, and events) in order to anticipate their trajectories and act effectively
56. **Ritual dissent:** workshop method designed to test and enhance proposals, stories, or ideas by subjecting them to dissent (challenge) or assent (positive alternatives); forced listening technique, not a dialogue or discourse
57. **Appreciative Inquiry:** asking questions that strengthen a system's capacity to apprehend, anticipate, and heighten positive potential; mobilization of inquiry through the crafting of the unconditional positive question
58. **Positive Deviance:** approach to change based on the observation that in any community, there are people whose uncommon but successful behaviors or strategies enable them to find better solutions to a problem than their peers, despite facing similar challenges and having no extra resources or knowledge
59. **Most Significant Change:** monitoring and evaluation technique used for evaluating complex interventions, based on a qualitative, participatory approach, with stakeholders involved in all aspects of the evaluation; involves the generation of significant change stories by various stakeholders involved in the intervention — the more significant of these stories are then selected by the stakeholders and in depth discussions of these stories take place
60. **Storytelling:** recounting an event that happened to you, to someone you know, or from another source, engaging the listener by pulling them into the story to participate in the conversation, rather than telling them what to think; an effective story is surprising, emotional but most importantly it must be credible
61. **Narrative:** the structure of events — the architecture of the story, comparable to the design of a building; story is the sequence of events, the order in which the narrative occurs — the tour through the building
62. **Anecdote circles:** narrative technique like focus groups except they're facilitated to elicit stories rather than judgment and opinion; the collected stories reveal what is really happening in the organization and what people value; powerful tool to gain insight and new perspectives using anecdotes — naturally-occurring stories, as found in the wild of conversational discourse, usually about a single incident or situation
63. **BarCamp/Unconference:** loosely structured conference emphasizing the informal exchange of information and ideas between participants, rather than following a conventionally structured program of events
64. **Knowledge Café/World Café:** structured conversational process intended to facilitate open and intimate discussion, and link ideas within a larger group to access the collective intelligence or collective wisdom in the room; participants move between a series of tables where they continue the discussion in response to a set of questions, that are predetermined and focused on specific goals
65. **Information architecture:** the structural design of shared information environments; a discipline and a set of methods that aim to identify and organize information in a purposeful and service-oriented way; the resulting document or documents that define the facets of a given information domain
66. **Usability:** making products and systems easier to use, and matching them more closely to user needs and requirements
67. **User interface:** the point of entry to a knowledge base that provides navigation, search, communication, help, news, site index, site map, and links to all tools
68. **User experience:** a person's perceptions and responses that result from the use or anticipated use of a product, system or service
69. **Search:** tools that help find documents, files, list items, content, and answers to questions –they allow specifying the scope or domain, whether to search text or metadata, and how results are presented
70. **Findability:** the ease with which information contained on a website can be found, both from outside the website (using search engines) and by users already on the website
71. **Taxonomy:** a particular classification arranged in a hierarchical structure that can be used to organize information so that it can be readily found through navigation, search, and links between related content
72. **Ontology:** formal specification of a conceptualization; renders shared vocabulary and taxonomy which models a domain with the definition of objects and/or concepts and their properties and relations; the representation of entities, ideas, and events, along with their properties and relations, according to a system of categories
73. **Metadata:** Structural - design and specification of data structures: data about the containers of data; Descriptive - about individual instances of application data (the content): data about data content
74. **Tagging:** adding non-hierarchical keywords or terms to documents, websites, files, lists, or social media content — allows related items to be listed, searched for, navigated to, and aggregated
75. **Semantic web:** a mesh of information linked up to be easily processed by machines, on a global scale; a web of data - of dates, titles, part numbers, chemical properties and any other data one might conceive of; RDF provides the foundation for publishing and linking data; an RDF triple is subject, predicate, object

76. **Portals:** websites which provide personalized capabilities to users through the use of customization, building blocks, and integration of multiple sources
77. **Intranets:** a private computer network which uses Internet Protocol technology to share information, operational systems, or computing services within an organization
78. **Websites:** sets of related web pages containing content such as text, images, video, audio, etc.
79. **Big data:** extremely large data sets that may be analyzed computationally to reveal patterns, trends, and associations, especially relating to human behavior and interactions
80. **Databases:** collections of information organized for easy access, management, and updating
81. **Repositories:** structured lists and databases which allow documents and other files to be stored, searched for, and retrieved
82. **Business intelligence:** the ability for an organization to take all its capabilities and convert them into knowledge
83. **Data warehouses:** copies of transaction data specifically structured for querying and reporting
84. **Data lakes:** storage repository that holds a vast amount of raw data in its native format, including structured, semi-structured, and unstructured data; the data structure and requirements are not defined until the data is needed
85. **Competitive intelligence:** defining, gathering, analyzing, and distributing intelligence about products, customers, competitors and any aspect of the environment needed to support making strategic decisions
86. **Customer intelligence:** gathering and analyzing information regarding customers, their details and their activities, in order to build deeper and more effective customer relationships and improve strategic decision making
87. **Market intelligence:** information relevant to a company's markets, gathered and analyzed specifically for the purpose of accurate and confident decision-making in determining market opportunity, market penetration strategy, and market development metrics
88. **Research:** collecting and analyzing information to increase the understanding of a topic or issue
89. **Digital workplace:** using an intranet as a platform for information sharing, interoperability, user-centered design, and collaboration; allows users to interact and collaborate with each other in a social media dialogue as creators (prosumers) of user-generated content in a virtual community, in contrast to intranet sites where users (consumers) are limited to the passive viewing of content created for them
90. **Social business:** Enterprise Social Networks, and using blogs, wikis, video sharing sites, podcasts, mashups, tags, tag clouds, pins, ratings, and folksonomies within an enterprise
91. **Social media tools:** web- and mobile-based technologies that are used to turn communication into interactive dialogue among organizations, communities, and individuals
92. **Cognitive computing:** simulation of human thought processes in a computerized model, involving self-learning systems that use data mining, pattern recognition and natural language processing to mimic the way the human brain works; makes a new class of problems computable, addressing complex situations that are characterized by ambiguity and uncertainty
93. **Artificial intelligence:** the capacity of a computer to perform operations analogous to learning and decision making in humans, as by an expert system
94. **Natural language processing:** a branch of artificial intelligence that deals with analyzing, understanding and generating the languages that humans use naturally in order to interface with computers in both written and spoken contexts using natural human languages instead of computer languages
95. **Machine learning:** giving computers the ability to learn without being explicitly programmed; a method of data analysis that automates analytical model building; using algorithms that iteratively learn from data to find hidden insights without being explicitly programmed where to look
96. **Neural networks:** computing systems made up of a number of simple, highly interconnected processing elements, which process information by their dynamic state response to external inputs; artificial neural networks (ANNs) are algorithms or actual hardware that are loosely modeled after the neuronal structure of the mammalian cerebral cortex but on much smaller scales
97. **Wisdom of crowds:** the process of taking into account the collective opinion of a group of individuals rather than a single expert to answer a question; a large group's aggregated answers to questions involving quantity estimation, general world knowledge, and spatial reasoning has generally been found to be as good as, and often better than, the answer given by any of the individuals within the group
98. **Crowdsourcing:** the practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people and especially from the online community rather than from traditional employees or suppliers
99. **Collective intelligence:** a form of universally distributed intelligence, constantly enhanced, coordinated in real time, and resulting in the effective mobilization of skills
100. **Prediction markets:** speculative markets created for the purpose of making predictions; the current market prices can then be interpreted as predictions of the probability of the event or the expected value of the parameter

2. Read books, blogs, periodicals, and sites.

Read books, follow blogs and LinkedIn posts, subscribe to periodicals, and visit websites. Start with the ones recommended in Chapter 1.

3. Join, participate in, and help lead communities, starting with the SIKM Leaders Community.

- **Subscribe:** Get regular email updates and read the threaded discussion posts and replies.
- **Post:** Start a new thread or reply in the threaded discussions.
- **Attend:** Participate in community events such as recurring calls and meetings.
- **Contribute:** Submit content to the community newsletter, blog, wiki, or site.
- **Engage:** Ask or answer a question, comment in a thread, give a presentation, help moderate, suggest speakers, and assist the community leader.

4. Attend at least one conference per year.

APQC, KMWorld, and Knowledge Summit Dublin all offer pre-conference workshops. Take advantage of these. Pay attention during conference sessions. Talk to as many people as possible, Sit with people you don't already know at meals and during breaks.

5. Post and reply regularly in social media.

Use one or more of these to share your ideas and link to your content that is posted elsewhere:

- Bluesky
- LinkedIn
- Mastodon
- Substack Notes
- Threads
- X.

6. Present, speak, lead discussions, and deliver training.

Present at internal meetings, calls, community meetings, conferences, and client meetings. If you struggle to get your conference presentation accepted, ask an established expert to allow you to co-present, or offer to help facilitate a panel discussion. Develop and conduct training for internal learning, community events, or conference workshops.

7. Post, write, and publish.

Use writing to test your ideas, solicit comments, and refine your thinking about a topic.

- Post to a community's threaded discussions, for example, the SIKM Leaders Community or KM4Dev.
- Write a blog post, for example, on LinkedIn.
- Create a newsletter in Substack and publish it regularly.
- Publish a document, for example, in Google Docs.
- Upload a presentation, for example, in Microsoft OneDrive.
- Write an article for an internal or external publication.
- Collect all of your previous writing, edit it, and use it to publish a book.

8. Attend training

Sign up for online courses. Enroll in a university's graduate program. Arrive early before a conference and attend multiple workshops. Purchase custom training from a specialized vendor.

9. Learn by doing

Try things out. Interact with others. Attend different events to see which ones are the most useful. Use as many of the 50 KM Components as possible. Roll up your sleeves, dive in, and get your hands dirty.

10. Find a mentor and become mentor

Here are ten ways to do so:

1. Ask someone you respect for a short initial conversation, to be followed by recurring ones if the first one goes well.
2. Participate in the KM Peer Mentoring Program sponsored by SIKM and KM4Dev.
3. Post in a community's threaded discussions to request one.
4. Write to the author of a book that you have read and learned from.
5. Comment to a blogger.
6. Reply to a social media post.
7. Talk to a presenter at a conference.
8. Take advantage of conference opportunities such as the Mentoring Morning Knowledge Café at KMWorld and the Fionn sessions at Knowledge Summit Dublin.
9. Visit the site of a thought leader and send them an email message.
10. Connect to people on LinkedIn and message them.

If the people you contact are unable to act as a mentor, ask them to refer you to someone else. When you feel ready, offer to become a mentor. You can learn a lot by serving as a mentor to others.

Chapter 24: News of KM's Death is Greatly Exaggerated

People have been saying KM is dying, dead, on life support, or irrelevant for years. In my view, this is simply not true.

When people ask me what it is that I do, I tell them "knowledge management," and then I have to explain what KM is. I say that KM allows one part of an organization to take advantage of what other parts of the organization already know. This can lead to innovation and better decision making, and it helps avoid reinventing the wheel and making the same mistakes over and over. People seem to understand this, and they respond that it makes sense.

The practitioners, terminology, and technology of knowledge management change over time. But the underlying need to share, innovate, reuse, collaborate, and learn does not go away. Here is a summary of the negative and positive indicators for the profession of knowledge management. Note that there are twice as many positive indicators as there are negative ones.

Negative indicators for the field of KM

1. Some KM channels have slowed down or disappeared.

- Blogs – Fewer are being started or maintained.
- Books – Fewer new ones are being published.
- Communities – Many local KM communities have become inactive.
- Conferences – Some are no longer held, e.g., Working Knowledge Research Center, Braintrust, Enterprise 2.0, KM Europe, KM Asia, KM Australia, KM4Dev, and KM Showcase.
- Periodicals – No print magazines are still published after the demise of *Inside Knowledge and KM Review*.
- Sites – Fewer KM sites are alive or maintained. Many of those still alive have not been updated in years. Many of the existing sites are associated with software products or service providers, not maintained by independent KM thought leaders.

2. KM programs and jobs continue to be eliminated or reduced as part of cost-cutting at major organizations

- Some KM programs have been abolished.
- Some prominent KM thought leaders have been laid off.
- Very few Chief Knowledge Officers (CKOs) exist.
- KM still struggles to find a home in organizations and is often moved from one group to the next.

3. Technology and tools still dominate some KM programs

- People and process elements are neglected.
- Vendor hype for tools continues to overstate the ease of implementation and the resultant benefits.
- KM is thought of as a KM system (tool), not as an ecosystem.
- KM efforts often fail to meet expectations.

4. Leaders are not on board

- They have a short attention span for business fads suggested by analysts and consultants.
- They don't articulate a vision for how they want KM to work.
- They don't lead by example.
- They give lip service to KM.

5. There is insufficient revenue to sustain a substantial KM practice in most large consulting firms

Positive indicators for the field of KM

1. KM communities continue to thrive

- The SIKM Leaders Community of Practice has been in existence for more than 20 years, with over 1,200 members, calls very month, and frequent threads with active discussions.
- The KM4Dev Community has existed for more than 25 years and continues to thrive.
- The KM Peer Mentoring Program co-sponsored by the SIKM Leaders and KM4Dev communities has achieved greater demand than can be met.
- The KM Global Network (KMGN) holds regular training and other events.
- Many local KM communities and KM LinkedIn groups are still very active.

2. Many new LinkedIn posts about KM are being made.

3. New KM podcasts and webinars are regularly offered.

4. New entrants into the field of KM continue to appear in communities, conferences, and messages sent to KM experts.

5. KM jobs continue to be posted and filled.

6. Organizations are still pursuing KM implementations. Smaller KM consultancies continue to thrive.

7. KM conferences continue to be held with good attendance.

- KMWorld and APQC are thriving.
- Knowledge Summit Dublin has achieved immediate success.
- Many other conferences are held regularly.

8. Universities are offering KM courses and KM degree programs.

9. GenAI is improving and gaining widespread use in support of KM.

10. Communities of interest and practice continue to be created and joined, including a wide variety of formats. Community management for customers and brand followers has bloomed into an accepted discipline.

Observations

1. The fundamental requirements for KM don't go away, even as organizations eliminate some KM programs. The need to share, innovate, reuse, collaborate, and learn is timeless.

2. Many IT departments don't get the idea of KM or social business; they are trying to cut costs, consolidate, and survive. So a separate KM program is needed to champion collaboration, communities, and connections.

3. Communities are not a new concept, but they still have great potential for enabling conversations, group learning, and the asking and answering of questions. Sometimes, the old proven, but not cutting-edge, approaches work best.

4. KM is a relatively stable profession but does not grow very much.

5. Most people have still not heard about KM.

6. Social business has great potential for KM, but it has to overcome problems

- Many people are reluctant to use social tools, including most leaders.
- Enterprise Social Networks are viewed with skepticism: yet another tool, something else you have to do, a waste of time, and/or not serious.
- Internal blog and wiki usage never took off in most firms.
- Email is still the killer app for collaboration. In most organizations, 100% of the people use email, while fewer people use more modern technologies. Social tools need to integrate with email.

7. Knowledge retention has been a hot topic for decades but has not yet been adequately addressed. The aging workforce is retiring en masse, and to take advantage of their knowledge and experience, we need creative approaches like pairing mentors with apprentices and keeping retirees connected to their former communities.

8. GenAI may replace the need for some internal KM, but it will also lead to increased need for many of the KM specialties. AI represents a significant opportunity for KM if it can be successfully harnessed to augment human capability and if effective use cases are developed.

9. The term "knowledge management" is still around, unlike "Enterprise 2.0." Other terms such as big data may also change or fade away in the future, but KM seems to have stubbornly survived.

10. Changing the name of KM is often suggested, but the term "knowledge management" has stuck for the past 30 years. It will probably be with us for the foreseeable future, and what we call it is not as important has how we do it.

Conclusion

KM may seem like yesterday's news, but the need for KM, and the opportunity to respond to that need, are persistent, even as the supporting approaches and technologies evolve.

KM programs should continue to focus on the needs of the target audience and the associated benefits, including preventing redundant effort, avoiding repetition of mistakes, and taking advantage of the expertise and experience of others in the organization.

Long live knowledge management!

About Stan Garfield

Stan Garfield is a knowledge management expert, author, speaker, and leader in the KM field. Stan spent 25 years at HP, Compaq, and Digital Equipment Corporation. He launched Digital's first knowledge management program, helped develop Compaq's corporate KM strategy, and led the Worldwide Consulting & Integration Knowledge Management Program for HP. Stan leads the SIKM Leaders Community with over 1000 members globally, and is regularly invited to present at numerous conferences, including KMWorld. He has published over 800 LinkedIn articles on leadership, innovation, knowledge management, communities of practice, enterprise social networks, and social media, and has authored several practical and popular KM books, including: *Proven Practices for Promoting a Knowledge Management Program*, *Lucidea's Lens: Special Librarians & Information Specialists; The Five Cs of KM*, *Profiles in Knowledge: 120 Thought Leaders in Knowledge Management*, and *Knowledge Nuggets: 100 KM Infographics*.

About Lucidea

Lucidea is a leading global knowledge management, library automation, and collections management software company, helping clients navigate the universe of information and turn it into actionable knowledge and delightful user/visitor experiences. They achieve this by providing tools that accelerate access to knowledge, content, and multimedia information resources,

while simplifying their management. Through products such

as SydneyDigital, Presto, GeniePlus, DB/TextWorks, Argus, and ArchivEra, Lucidea fulfills their mission of enabling knowledge center, library, museum, and archives clients to optimize delivery of knowledge, information and content while achieving financial and operational goals—and to help ensure that information management is tied to organizational strategy.

In addition to offering products and services that help ensure

the sustainability and success of their clients, Lucidea is committed to offering professional development resources for knowledge managers, librarians, museum practitioners, archivists, and other information professionals. Their program includes webinars delivered by internal and external experts, the Think Clearly blog, conference presentations and panels, and now this latest in their lineup of offerings from Lucidea Press.

12 Steps to KM Success:

A Guide to Implementing Knowledge Management

Successful knowledge management can improve internal communication, reduce duplication of effort, boost productivity, reduce risk from staff turnover, add value to your client relationships, and have a genuine impact on competitiveness and profitability. This book can help you achieve these and other benefits for your organization.

An effective KM program requires processes that facilitate knowledge sharing, capture, and reuse—and knowledge managers enable those key processes by implementing and integrating the right tools.

If you are considering initiating a knowledge management program, this book is an essential introduction to the subject area. A checklist for success, it offers straightforward advice from planning and strategic direction all the way through to program implementation of the components used to support successful KM.

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