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Tools for a Real Knowledge Management Payoff

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Say Knowledge Management to most business people today and they immediately think technology. Technology may be part of most KM initiatives, but rather than dictating the concept of KM, it is best utilized in an enabling role as one part of a comprehensive approach. Successful KM is a complex mix of business processes, people and technology. While supported by technology, successful KM initiatives are not simply technology solutions. They are programs of wide-reaching cultural change that impact the organization in significant ways. More importantly, in order for any organization to accomplish its mission, business processes that emphasize employee engagement and facilitate the identification, sharing, and cultivation of knowledge need to be designed and implemented.

The process of "learning before, during and after" any event or project was introduced as a KM initiative at British Petroleum in the mid 1990's and has been used successfully in many companies since. A variety of tools were adopted to support these learning processes. *Peer Assists* facilitated learning before, *After Action Reviews* contributed to learning during and *Retrospects* offered learning after. The *Knowledge Asset* was the key KM product. It is the core repository for knowledge and expertise in an organization.

Consider this story:

Jo Singel, a VP in Corporate Education in the HR department of Chase Manhattan Bank was responsible for an automated information system, called the Measuring Learning Impact (MLI) system. This system, administered by two employees, measured the impact of learning initiatives throughout the bank. For 18 months they had worked hard to design and implement the MLI and by many accounts the project was a success, the bank was able to identify those training and development efforts that were meeting their learning objectives and therefore could target and budget for programs accordingly. But, because it was a relatively new system, these two employees held nearly all of the institutional knowledge of the system. Ms. Singel began to fear the impact on her small group. The specialized expertise required to administer the MLI was in the hands of only two people in the entire department. What would happen to the project if either or both of her key employees left? How could she protect the bank from losing the key and critical knowledge that supported the MLI and the project's success? She decided to involve these employees in the development of a Knowledge Asset around the MLI. When both of these employees decided to leave the organization less than one year later, she was glad that she had. In the course of developing the MLI Knowledge Asset an important change had taken place. Chase had announced and begun implementation of a merger with JP Morgan. This meant that the new team that was assigned to take over the MLI would need to learn about and take ownership for the system while they simultaneously dealt with merger integration and assimilation issues. That they were able to step into their new responsibilities without any difficulty is a powerful attestation of knowledge management at work.

Recently, I had the opportunity to talk to Jo Singel about the MLI project. Included in our conversation were Carol Gorelick and Carter Crawford of Solutions for Information & Management Services, Inc – both of whom were responsible for creating the Knowledge Asset for the MLI at Chase Manhattan.

MS: Can you tell us about "Knowledge Assets" and why it was so important in the MLI story?

JS: I can only tell you that it was a case of survival, perhaps that is why the story is so compelling. For all intents and purposes, without the Knowledge Asset, the MLI would have been lost or at the very least significantly disrupted. That was 18 months worth of work, imagine the cost to the company! To say nothing of how demoralizing that kind of experience can be for the people who have worked long and hard to make it happen. Let Carol and Carter tell you

about the mechanics, for me the Knowledge Asset was a lifeline at a time when we could have lost the foundation of our project.

CC: Once upon a time, in the industrial age, machinery determined what you could produce and sell. That is no longer true. Today, the most important asset is the people and what they know. But unlike machinery, people are mobile – they up and leave – and when they leave an organization, their knowledge goes with them. As companies come to realize the value of their intellectual assets, they are putting into place initiatives that manage these assets. The most popular term for these initiatives is Knowledge Management or KM for short. Actually we prefer the term Knowledge Mobilization. But it makes no difference what you call it. The goals are simple – make all successes repeatable and sustainable. Recognize when you make a mistake and never make the same mistake in the same way ever again. Never reinvent the wheel or duplicate an effort. Keep the learning curve as short and fast as possible. Make every decision, at every level, with the full force of your knowledge base behind you. These make up the foundational creed for Knowledge Management. Now, there are various tools and processes that we use to mine the knowledge in any organization or area of the business. We come at it from all angles.

CG: Yes, the Knowledge Asset is really a tool for Knowledge Management. Knowledge Assets are concerned with the what, where, when, who, how and why of key areas of a business. They include histories of what has been done in the past – what has worked and not worked, codes of practice that are validated as a future approach—the map, what they've been doing that can be used by others, actual comments of the participants – their stories in their own words – this can be in written, audio or video form, and links to others who have the experience and often the tacit knowledge that keeps the organization moving.

CC: Knowledge Assets are organic – they are never “finished” – stories are added, new information included on an ongoing basis. Above all, things change – the Knowledge Asset is built to accommodate and reflect these changes.

MS: *I am intrigued. You say you prefer the term “Knowledge Mobilization.” That’s an interesting distinction. Can you tell me why you make it a point to introduce the term to organizations?*

CC: Knowledge Management is an unfortunate term, but it has been around for so long that it will probably stick. Most likely the Management part stemmed from organizations putting in place systematic processes to capture their information, applications, expertise and know-how – their intellectual capital. Knowledge Mobilization, not only has the same acronym, but it more accurately describes what KM is all about: moving knowledge and expertise across an organization.

CG: It is not capturing knowledge that counts, “captured knowledge” is static knowledge – at best it serves a limited purpose in the organization, just one very small part of what needs to occur for organizations to truly realize the benefits of the expertise, experience and know-how that drives the business. Knowledge Mobilization emphasizes action, in a way it is about how we put legs to our knowledge, travel it throughout the organization and operationalize it within the business. The payoff is in reusing and refining our knowledge at every opportunity. Mobilization speaks to the energy and active participation that is required in this process.

MS: *Interesting. But back to the Chase story. What criteria do you look for when putting together a Knowledge Asset?*

JS: I was thankful that I had two articulate individuals who were able to put their work into words. I think that really worked well with the MLI. They also knew what they were doing – they had a clear understanding of the work as well as how it fit with the work of others -- the proverbial big picture.

CG: Yes, that always helps. But it’s not a requirement, in fact some very inarticulate people hold key knowledge in organizations and in those cases the Knowledge Asset may be even more critical. We look to link the Knowledge Asset to major processes or functions. In the bank case training was a major budget item bank-wide. The training departments needed to measure the impact of their different courses and the MLI did this for them.

CC: Oftentimes KAs grow out of a process we call a “Retrospect.” Retrospects are best described as “knowledge capture events” which are held at the end of a project, involving as many members of the project team as possible. It is an effective way of capturing the knowledge before the team disbands.

CG: These are structured, facilitated meetings which can last anywhere from a couple of hours to a few days. It helps to identify valuable lessons learned and is a documented resource for others with similar projects. Let's say you are in a consumer products company that introduces many new products. After each new product launch, you conduct a retrospect. Several of these retrospects can then be put together to create a Knowledge Asset on launching new products.

MS: *Information changes so rapidly, how do you assure that the Knowledge Asset does not become dated? Do you ever purge the old information?*

CC: Oh sure, absolutely – that's a real concern. Old information, if it is no longer valued, should be eliminated. Someone has to own – take real responsibility for a KA. Let's say a law firm has a KA on “What we know about writing contracts involved in intellectual property.” The law firm probably has a group of lawyers who work on contracts. We would recommend that they formalize their group into a community and select one person to own the KA. Then, when one lawyer works out a new or innovative way of handling a contract, it can be reviewed by the group and added to the KA. The same process would apply to outdated information.

MS: *In business environments that value success and emphasize “getting it right,” how do you get people to talk about their mistakes?*

CG: Good question. We like to phrase the question “What could be improved?” or “What would you do differently next time?” rather than “What went wrong?” Also, people are more willing to talk about improvements if they are allowed to make the recommendations themselves. It is not what they did wrong; it is how they are going to do it even better. Good facilitation skills help.

JS: That wasn't a problem with the MLI. Of course there were corrections that had to be made. This was the team that launched the project – there were trials and errors early on – we had to figure out what worked best. But both of these employees were proud of the way they learned from the early mistakes, what they did with them. We made changes along the way and it made the project stronger. The KA captured all of this, it was part of the process and all of this got passed along.

MS: *What do you think it is that makes the Knowledge Asset so useful? What's the one thing that HR professionals and business leaders should know about this work?*

CC: Where should we start? Other than the obvious – collecting, harvesting and storing valuable knowledge for the organization, identifying the people who are most experienced in different areas. I think, and this is the part that I find so exciting when I'm working with people on a KA, that the process generates even more knowledge as people come together to sort out their experiences and articulate the tacit knowledge that makes the difference to the project or area of the business.

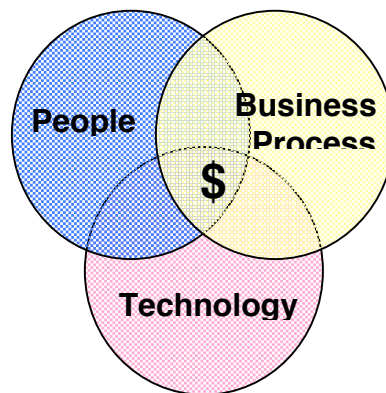
JS: It was very gratifying to see employees take such a sense of ownership around the project. The excitement this effort generated was palpable and the KA captured not only their words but also the expression on their faces and their desire to share their work with others. I think it is precisely this sense of contributing to a larger effort—to this knowledge effort – that makes the KA so powerful and useful to the organization. These employees have come and gone but they remain an indelible part of the business, you know that they are part of the halls and walls of this organization – that is a powerful thing.

WHAT IS THE GOAL?

THE OVERARCHING GOAL OF KM IS TO DELIVER OUTSTANDING BUSINESS SUCCESS THROUGH FULL AND SYSTEMATIC USE OF YOUR ORGANIZATION'S KNOWLEDGE, TAPPING INTO WHAT YOUR ORGANIZATION KNOWS TO DELIVER SUPERIOR BUSINESS RESULTS:

- **MAKE ALL SUCCESSES REPEATABLE AND SUSTAINABLE.**
- **RECOGNIZE WHEN YOU MAKE A MISTAKE AND NEVER MAKE IT AGAIN.**
- **NEVER REINVENT THE WHEEL OR DUPLICATE AN EFFORT.**
- **SHORTEN THE LEARNING CURVE.**
- **MAKE EVERY DECISION, AT EVERY LEVEL, WITH AWARENESS OF THE FULL KNOWLEDGE BASE OF YOUR ORGANIZATION.**

THE KM SWEET SPOT



SUCCESSFUL KM IS A COMPLEX MIX OF BUSINESS PROCESSES, PEOPLE AND TECHNOLOGY.

THE TOOLS

KNOWLEDGE ASSETS

CONCERNED WITH THE WHAT, WHY, WHERE, WHO WHEN AND HOW ABOUT KEY AREAS OF THE BUSINESS. THEY CONSIST OF THE FOLLOWING:

- PERFORMANCE HISTORIES OF WHAT HAS BEEN DONE IN THE PAST
- CODE OF PRACTICE DISTILLED AND VALIDATED AS A FUTURE APPROACH
- ACTUAL COMMENTS OF THE PARTICIPANTS, IN TEXT, AUDIO OR AUDIOVISUAL FORMAT
- LINKS TO THE COMMUNITY OF PRACTICE WHERE THE EXPERIENCE AND TACIT KNOWLEDGE RESIDE

KNOWLEDGE ASSETS SHOULD BE ORGANIC AND GROW IN KNOWLEDGE AS THE ORGANIZATION GROWS AND LEARNS .

PEER ASSISTS

STRUCTURED, FACILITATED MEETINGS OR WORKSHOPS WHERE INDIVIDUALS ARE INVITED FROM OTHER BUSINESS UNITS OR OTHER BUSINESSES, TO SHARE THEIR EXPERIENCE, INSIGHTS AND KNOWLEDGE WITH A TEAM THAT HAS REQUESTED HELP. A PEER ASSIST TARGETS A SPECIFIC AND SIGNIFICANT BUSINESS ISSUE AND RESULTS IN RECOMMENDATIONS FOR IMPROVED APPROACHES TO THE ISSUE AND NEW INFORMATION AREAS TO EXPLORE. FOR SOME COMPANIES, PEER ASSISTS HAVE BECOME THE FASTEST WAY TO START DELIVERING BUSINESS BENEFITS FROM THEIR COMPANY'S KNOWLEDGE.

AFTER ACTION REVIEWS

SHORT FOCUSED MEETINGS FOR A TEAM, BY THE TEAM, LASTING LESS THAN HALF AN HOUR THAT ARE HELD AFTER EVERY IDENTIFIABLE TEAM EVENT. FOUR QUESTIONS ARE ANSWERED BY ALL THE TEAM MEMBERS:

- ▶ WHAT WAS SUPPOSED TO HAPPEN?
- ▶ WHAT ACTUALLY HAPPENED?
- ▶ WHY WERE THERE DIFFERENCES?
- ▶ WHAT CAN WE LEARN?

AFTER ACTION REVIEWS ALLOW THE TEAM TO ADDRESS AND OPTIMIZE THE WAY THEY WORK DURING A PROJECT AND TO START BUILDING ITS COLLECTIVE OPERATIONAL KNOWLEDGE. THEY ARE THE FOUNDATION FOR A KNOWLEDGE CULTURE IN THE WORK PLACE.

RETROSPECTS

KNOWLEDGE CAPTURE EVENTS HELD AT THE END OF A PROJECT, INVOLVING AS MANY MEMBERS OF THE PROJECT TEAM AS POSSIBLE. IT IS AN EFFECTIVE WAY OF CAPTURING THE KNOWLEDGE BEFORE THE TEAM DISBANDS. IT IS A STRUCTURED AND FACILITATED MEETING WHICH LASTS FROM A COUPLE OF HOURS TO A COUPLE OF DAYS. IT RESULTS IN IDENTIFYING VALUABLE LESSONS LEARNED AND IS A DOCUMENTED RESOURCE FOR OTHERS WITH SIMILAR PROJECTS. RETROSPECTS ARE A MEANS TO BUILD KM INTO YOUR PROJECT MANAGEMENT PROCESS.