

When Your Organization Keeps Changing, Is Critical Knowledge Lost?

for the Fairfield County Chapter, SLA

October 18, 2005

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...Why should you, and how can you prevent it?

□ Discovery

- Candidate content and expertise
- Current network of knowledge flows
- Experts
- Infrastructure and packaging
- Business model

□ Risk Assessment and Mitigation

- Mapping and documenting state
- Projected changes
- Planning for Change
- Where will networks, flows of information, and infrastructure break?

Justification for treating Knowledge as a critical corporate asset from the SMAC and reprinted by AICPA

In a paper written by Margaret Tanaszi and Jan Duffy of LGS for the Society of Management Accountants of Canada:
[Measuring Knowledge Assets](#)

Knowledge always has been and will continue to be important to business. What has changed in recent years is:

- our awareness of the value of knowledge, both tacit and explicit;
- our understanding that **intangibles** have a large impact on future cash flows;
- our ability to leverage and share knowledge resources;
- the environment in which business is conducted, i.e., the knowledge economy; and
- the recognition that knowledge may be the only form of sustainable competitive advantage

Key point:

“Organizations need to manage their knowledge resources or their intellectual capital assets effectively, and to leverage them for the benefit of the stakeholders”

Intellectual Assets:

- *Competencies*
- *Processes*
- *People*

Discovery Process

Meet with key innovators, business leaders, marketing, support, and IT personnel to identify knowledge assets, usage and flow



Explore where knowledge assets are available and how they currently find an audience

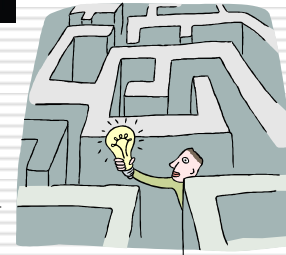


Diagram current technologies used to create, store and search for information content, communication (information push), storage (organization), and retrieval (information pull)



To uncover and document what happens with knowledge in the organization

(e.g. When a scientist has an idea, what happens to it?)

- Scenario 1 (structured)
 - Idea record
 - Review team
 - Adoption for research
 - Laboratory notebooks
 - Development & commercialization
 - Patenting
 - Marketing
 - Sales

- Scenario 2 (free flow)
 - Proceeds with research in the literature
 - Talks to colleagues internally
 - Blogs
 - Emails
 - Participates in conference roundtables
 - Makes a proposal to the organization

e.g. When a new market is being considered for positioning an old product

□ Scenario 1 (structured)

- Market data research
- Analytical evaluation
- Business recommendations

□ Scenario 2 (free flow)

- “Trial balloons” floated
- Partners sought
- Negotiations proceed
- Contract developed
- Business decision formalized/announcements

Mapping the Evidence

What to capture:

- People*
- Relationships (CoPs)*
- Organizational structures*
- Projects, Programs*
- Products*
- Markets, Industries*
- Customers, Prospects*
- Flow of information*
- IT Infrastructure*

Tools to capture (eg):

- Diagramming (Visio with Task Map)*
- [*InXight Star Trees*](#)
- Spreadsheets*
- Databases*
- Protégé - Ontologies*

Leadership and Team Building

Short Term:

Low hanging fruit what is getting lost –make a statement

Engage managers and key knowledge advocates and contributors to discover pain points, risks, strategize solutions

Find partners to initiate collaboration, find buy-in for ideas, and advise (strongest with IT)

Long Term:

Build a sustainable knowledge infrastructure

Build a multi-disciplinary team to advise and consult on knowledge needs and existing knowledge repositories

Point people need to be in place to advocate at all critical levels of management – where the power resides

Anticipating Change & Planning for Change

- ❑ Mergers, Acquisitions, or Strategic Partnerships
- ❑ Major customers experience major change
- ❑ Disruptive technology or innovation upsets your markets
- ❑ How will your knowledge base change – content categories, contributors?
- ❑ Who will be the key experts?
- ❑ Where will expertise be needed?
- ❑ What will be the focus?

Finding the Potential Break Points

- ❑ IT infrastructure: information flow
- ❑ Virtual environment pressures – new paths, new domains, new content
- ❑ Resource sharing shifts
- ❑ People and positions may disappear or new ones appear
- ❑ Geography
- ❑ Cultural mergers – can they work

Create transparency across silos of content

– eliminate the confusion (Immediate concerns)

- ❑ *Employees want to know who knows what*
 - ❑ *New hires need to understand the organization*
 - ❑ *Customer contact experiences are blocks for building a knowledgebase across all domains that have customer contact (sales, contracting, account managers, internal and field support)*
 - ❑ *Secure "where to locate" valuable content across the domain*
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Mitigating Activities to Prevent Loss

Communication mechanisms: Training, Hot Tips, Lunch Seminars, Virtual 'featured speaker' meeting, visit and engage managers, blogs or threaded email lists

- Correct misunderstandings about where and how to find information on an enterprise scale
- Help on how to use the available technology
- Create transparency by sharing insights and guiding to key resources (people and places)
- Establish clear guidelines for employees to "publish" their content for company use

Information sessions will resolve these issues, and elicit comments about what else is needed

The Culture is the Key to Successful Change Management

If **Knowledge** is a respected, valued, and a visible part of the culture, ongoing efforts to preserve it will become routine.

People will miss **it** when the flow is disrupted, but someone needs to be the advocate and catalyst for sustaining the infrastructure

Your role

- Documenting
- Finding the breakdowns
- Lobbying
- Researching technologies
- Bridging the communications gap among the interested parties
- Consulting
- Interpreting & Defining: content capture, organization and retrieval in terms others understand

The End

Thank you for listening and learning

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