Challenges in Leveraging Collective Knowledge Across Boundaries

4th Annual Army Operational Knowledge Management Conference
October 31, 2008
Kansas City, Missouri

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Our Premise

The KM Professional’s view of knowledge - what it is and how we know it - influences the KM strategies we design and implement
Leveraging Explicit Knowledge
- Capturing documents & specific/analytical content
Leveraging Explicit Knowledge

Assumptions about Knowledge

• Knowledge is an asset that the organization needs to manage just as it manages capital and human resource assets.

• As an asset, organizational knowledge is the responsibility of leadership who makes decisions about what knowledge to capture and make available to workers.

• The most useful organizational knowledge is that of subject matter experts (SME) for technical and strategic topics.

• SME knowledge can be adequately captured in documents and disseminated through technology.

• Organizational knowledge is relatively stable – so useful knowledge can be stored now and withdrawn when needed.
KM Strategies for Leveraging Explicit Knowledge

- Build systems to capture the organization’s knowledge in documents.
- Design systems to insure the validity of the captured knowledge by having experts/SMEs vet the content so that only the best is saved.
- Make the organization’s knowledge readily available to all employees through a knowledge repository.
- Incentivize employees to search the repository for the knowledge they need to do their jobs effectively.
Leveraging Explicit Knowledge

Organizational Implications

- Standardization of practices
- Reduction in the duplication of effort
- Perception that KM yields few results
Leveraging Explicit Knowledge
- Capturing documents & specific/analytical content

Leveraging Experiential Knowledge
- Communities of Practice
- Expertise locators
- Team processes for Learning before, during, and after
Assumptions About Leveraging Experiential Knowledge

• Much of the knowledge critical for organizational effectiveness is in the heads of front line workers.
• There is not a knowing-doing gap
• The know-how learned from experience is as valuable to an organization as SME knowledge
• Given the opportunity, communities can self-correct knowledge - they do not need to be controlled.
• To be useful, knowledge has to move in real time
KM Strategies for Leveraging Experiential Knowledge

• Build communities to move knowledge with speed equal to the speed of change - capture and vetting is often too slow

• Create peer to peer exchanges - remove the bottleneck of SMEs

• Build reflection processes to learn from action- peer assists, after action reviews, retrospects

• Facilitate conversational processes, e.g. knowledge café, discussion forms, open space technology

• Build expertise finders to locate peers who have needed know-how.
Leveraging Experiential Knowledge
Organizational Implications

• Increased decision making discretion at the front line
• Greater ability for the front line to react and initiate action
• Increase in the diversity of opinion being voiced
Leveraging Explicit Knowledge
- Capturing documents & specific/analytical content

Leveraging Experiential Knowledge
- Communities of Practice
- Expertise locators
- Team processes for Learning before, during, and after

Leveraging Collective Knowledge
- Social media & social processes for informal & dynamic knowledge conversations

KM Evolution
Challenges in Leveraging Collective Knowledge Across Boundaries

1. Generational Knowledge Transfer
2. Credibility and trustworthiness of others’ knowledge
3. Transparency - Learning in Public
Generational Knowledge Transfer

• Are we really that different?
• Generational clashpoint
• Proven knowledge transfer methods & some generational adaptations
## Generational Differences

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Today’s Workforce</strong></td>
<td>10%</td>
<td>45%</td>
<td>45%</td>
<td>Entering</td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td>The hard way</td>
<td>Too much and I’ll leave</td>
<td>Required to keep me</td>
<td>Continuous and expected</td>
</tr>
<tr>
<td><strong>Learning</strong></td>
<td>Classroom</td>
<td>Facilitated</td>
<td>Independent</td>
<td>Collaborative &amp; networked</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td>Top-down</td>
<td>Guarded</td>
<td>Hub &amp; spoke</td>
<td>Collaborative</td>
</tr>
<tr>
<td><strong>Problem-Solving</strong></td>
<td>Hierarchical</td>
<td>Horizontal</td>
<td>Independent</td>
<td>Collaborative</td>
</tr>
<tr>
<td><strong>Decision-making</strong></td>
<td>Seek approval</td>
<td>Team informed</td>
<td>Team included</td>
<td>Team decided</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td>Command &amp; control</td>
<td>Get out of the way</td>
<td>Coach</td>
<td>Partner</td>
</tr>
<tr>
<td><strong>Feedback</strong></td>
<td>No news is good news</td>
<td>Once per year</td>
<td>Weekly/daily</td>
<td>On demand</td>
</tr>
<tr>
<td><strong>Technology use</strong></td>
<td>Uncomfortable</td>
<td>Unsure</td>
<td>Unable to work without it</td>
<td>Unfathomable if not provided</td>
</tr>
<tr>
<td><strong>Job changing</strong></td>
<td>Unwise</td>
<td>Sets me back</td>
<td>Necessary</td>
<td>Part of my daily routine</td>
</tr>
</tbody>
</table>

Source: Lancaster & Stillman, 2003
Generational Clashpoint

• “chain of command” Traditionalists
• “change of command” Boomers
• “self-command” Xer’s
• “don’t command – collaborate!” Yer’s

Source: Lancaster & Stillman, 2003
Gen Y'er Preferences That Demand KM Attention

- Communicate, engage and 'learn' online
- Adept at gathering information and sharing with peers
- Spirit of openness
- 'Multi-tasking' as a way of life (and work)
- Geared for teamwork
- Natural networkers
- Empowered

Isn’t this the workforce we’ve been trying to create ... Generation Virtual?!
Knowledge Transfer Lessons

• 'Nice to have' isn't good enough
• Consider the knowledge "receiver" at least much as the "source"
• Don’t underestimate the effort required by the source for the receiver to 'get it'
• Timing is everything
• Age matters!
Spectrum of Knowledge Transfer Methods

- Communities of Practice
- Simulation & Serious Games
- Wikis
- Peer Assist
- Mentoring

Different Context

Formal Education & Training

Same Context

Knowledge Capture

Podcasts

IM

Blogs

Wikis

Mentoring

Job Shadowing

Learning Histories

Simulation & Serious Games

Expertise

Specific Knowledge

Analytic Knowledge
"Biggest Bang for Buck"

Different Context

Same Context

Specific Knowledge

Analytic Knowledge

Expertise

Peer Assists

Social Media

Communities of Practice
Generational Adaptations for Communities of Practice

• Open up your community to practitioners past, present and future
• Offer a choice of media with guidance in it’s application to support interactions and knowledge exchanges
• Support sub-setting of CoPs to facilitate conversation among generational peers, but ensure relevant ‘nuggets’ and issues are passed to the broader CoP membership
• Provide an experienced CoP facilitator to observe, coach & promote cross-generational interactions
• Ensure all generational perspectives are raised
Generational Adaptations for Peer Assists

• Younger generations are more inclined to seek input from other people and multiple sources...but need prompting to speak up and share their experiences
• Gen Xers and Yers may be more inclined to participate if the session is held virtually
• Wikis provide a collaborative authoring space conducive to the PA process
• Boomers prefer stories of experience more than Gen Y'ers ... but it’s really, is how you tell the story!

“Be quick concise and to the point.”
-- Gen Y employee in global US-based pharma company
Generational Adaptations for Social Media

• Understand the 'digital maturity' of the users
  - Use reverse mentoring to help a boomer learn the tools
  - Provide simple templates that features the basic commands

• Actively facilitate the interactions

• Promote usage as a learning aid or resource to inform a person’s thinking, not as the definitive answer

“One of our young consultants provided a client with some data from Wikipedia, which turned out to be wrong. I’m scared to death of the Internet as a source of knowledge.”
- Partner in a Global 500 Professional Service Firm
Programmatic Approach to Generational Knowledge Transfer

An practical example of Job Redesign: The employee gradually reduces their work hours by transitioning activities to successors while increasing their focus and goals on knowledge transfer, coaching and mentoring.

Source: American Express & The Conference Board, 2008
Challenges in Leveraging Collective Knowledge Across Boundaries

1. Generational Knowledge Transfer
2. Credibility and trustworthiness of others’ knowledge
3. Transparency - Learning in Public
Credibility and trustworthiness of others’ knowledge

You’re in a meeting and you and the guy next to you get to talking, and he begins to tell you about a technique he has been using with his team, that has really brought them together. You are interested in this idea because you’re working with a team that has just not gelled. You ask him a lot of questions about how it works.

How do you judge if this guy’s knowledge is credible? Whether it is worth trying with your own team?
Credibility and trustworthiness of others' knowledge

- How does the receiver determine the credibility of another’s knowledge?
  - What does the receiver have to know about the other?
  - About the context?
  - About the nature or type of knowledge it is?
Credibility and trustworthiness of others’ knowledge

- Who in the organization is privileged to determine whether a given item of knowledge is credible (in a community discussion, or in email, or in posted docs and PP?)
  - SMEs
  - The receiver
  - Manager/commander
Leveraging Collective Knowledge

The erosion of cognitive authority

(Prusak)
Challenges in Leveraging Collective Knowledge Across Boundaries

1. Generational Knowledge Transfer
2. Credibility and trustworthiness of others' knowledge
3. Transparency - Learning in Public
Transparency

“Learning in Public”
Transparency

How can an organization learn without the free flow of information vertically as well as laterally?

“What all these stories have in common is a system that requires a demonstrated ‘need to know’ before sharing. This approach assumes it is possible to know, in advance, who will need to use the information.” (p 417)
Transparency - Learning in Public

Challenges

1. Moving accurate, complete and timely information up from the frontline

2. Leadership disclosing accurate, complete and timely information to the frontline

3. Providing information in a way that it can be understood in the context of the receiver

4. Involving both the top and bottom in the act of sensemaking
The Act of Sensemaking

Sensemaking is the act of creating meaning out of a mess of unstructured data and information.

It may be possible to find a definitive answer to what caused the space shuttle to disintegrate on its return flight, e.g. that a piece of the wing broke off and damaged the tiles. But to determine what actions within the system resulted in that happening, is an act of sensemaking.

The understanding that results from sensemaking is not a definitive answer, rather it is an understanding that is adequate for the organization to plan and take its next action.
data pulled from a variety of media to construct fresh frameworks of action-outcome linkages that include their multiple interpretations.

The variety of data needed to pull off this difficult task are most available in variants of the face to face meeting."

Sensemaking in Organizations, Karl Weick
The Changing Role of the Frontline in Strategic Issues

The current practice

Frontline provides manager/commander complete, accurate & timely input pertinent to a strategic issue

Manager/commander makes sense of the all the input

Manager/commander makes a strategic decision

The changing role

Frontline and manager/commander jointly engage in conversation to identify input pertinent to a strategic issue

Frontline and manager/commander jointly make sense of inputs

Frontline has increased discretion to act
Co-creation of Knowledge

- Increasing involvement by end users in products and services
- Harnessing collective intelligence on the demand side

![Crossing](image1.png)
![IBM Marketplace](image2.png)
![Boundaries](image3.png)

"Prosthetics shouldn’t cost an arm and a leg.
The Open Prosthetics Project
AN INITIATIVE OF THE SHARED DESIGN ALLIANCE"
“Currently, management is hierarchical, competence is considered a matter of job function, and contributions are made by job description.

We need to move toward more modular co-creation and ‘edge competence’ in order to capture the kinds of innovation that occur at the grassroots.”

Jacques Bughin, McKinsey and Company
“What’s new about the new economy is that work is conversation.”

Alan Webber, Founder of Fast Company
Leveraging Collective Knowledge

Emerging Assumptions

• The wisdom of crowds beats expert judgment in many situations
• Expert opinion “informs judgment” rather than providing answers
• Users require extensive knowledge about the originator in order to determine the trustworthiness of knowledge
• Innovation occurs at the grassroots through “edge competence”
• Gen Y’ers are geared for networking and collaboration
• For an organization to learn, individuals have to “learn in public”
• An educated, experienced frontline is capable of making their own sense of strategic issues
• Conversation drives sensemaking and the exchange of tacit knowledge
• For an organization to leverage its collective knowledge, undistorted knowledge must move vertically as well as laterally
Leveraging Collective Knowledge

KM Strategies

• Conduct team & workgroup tasks in a collaborative space. Open that space to the input of any interested organizational members - Learning in Public
• Encourage blogging at all levels to raise undiscussable issues
• Make available to the receiver more information about the originator of the knowledge, e.g. Facebook, F2F meetings, etc.
• Facilitate open discussion forums on the most controversial and complex issues the organization is facing
• Use the “fresh eyes” of Gen Yers to learn what organizational practices are “outdated”
• Provide an experienced Forum facilitator to promote cross-generational interaction
• Develop processes to invite the front line into knowledge creation
• Assist managers in formatting their regularly scheduled meetings as conversation, rather than the typical reporting format
• Coach managers in the skills that encourage confrontation, challenge to existing ideas, and controversial input
Which of these strategies have you used?

Which of these strategies do you have doubts about?

What's missing from this list?
KM Evolution

Leveraging Explicit Knowledge
• Capturing documents & specific/analytical content

1995

Collection
Learning in Private
Need to Know
Management Control of Content

2000

Leveraging Experiential Knowledge
• Communities of Practice
• Expertise locators
• Team processes for Learning before, during, and after

2005

Leveraging Collective Knowledge
• Social media & social processes for informal & dynamic knowledge conversations

Conversation
Learning in Public
Transparency
User control of content

Complexity