Foundations of knowledge

By Keith De Larue

How do you go about transferring knowledge from one part of an organisation to another? For example, from a technical product management group to a business-to-business sales force?

In traditional organisational structures, we often separate content management, intranet, communications and learning into separate silos. Yet all of these areas provide tools that assist in this knowledge transfer – the desired end result is an informed audience.

The central element of the KM toolkit is a knowledge library. In order to ensure that the target audience has easy access to all needed information, a single, central repository that includes all required content is important. This library should be capable of storing audio and video, as well as conventional documents, to ensure that all audience needs and learning styles can be catered to from a single source. The content needs to be reliable, accurate and up to date.

This knowledge library provides a "pull" reference source. In order to provide information in a predictable format, standard templates can be provided for a defined range of content types. Depending on the nature of the target audience, remote access to the library may also be important. If the workforce is mobile, then access via hand-held devices would also be appropriate.

Content should be accessible via a simple taxonomy addressed to the needs of the target audience, and search functionality is also important. Access should be fast, simple and transparent for the audience. If the security policies of the organisation will permit, then anonymous reader access is recommended.

The provision of information on new and updated content is also helpful to the audience. This should be provided on an opt-in basis, using an email subscription service or RSS feed. Audience members should be able to select content categories of interest by using the same audience-focussed taxonomy.

To supplement the "pull" nature of the central repository, another important element of the toolkit is a simple, regular, "push" newsletter. This provides regular updates on new initiatives and activities that are relevant to the audience. This may be weekly, and would be most appropriately delivered on a standard intranet site. Each week's issue should be displayed on the front page, with earlier issues accessible via an archive on the site.

The audience's attention can be drawn to each week's issue via a simple email or RSS feed, focussed on the main topics of the issue. This should provide sufficient information for audience members to determine if topics relevant to their role appear in the issue. If not, then they will have no need to click through to the site.

The newsletter site should focus only on overview and transitory information; all details and changes in reference material should be updated on the central library, which can be linked to from the newsletter. Other tools in the toolkit can vary from time to time, depending on audience needs, available technology, cost/benefit and other factors.

Some suggested tools include:

Regular combined web and audio conference briefing sessions, using scripted presentations by subject matter experts with accompanying slide presentations. Provision can be made for questions and answers to be included. The sessions can be recorded and edited for later access (as audio only or video files) via the central library. With the subscription service, this also provides a podcast or vodcast function. An online quiz, providing a high-level overview of a topic in a fun learning environment. This would be supported by summarised source materials, and provide prizes for speed and accuracy in answering a range of simple questions. This approach is effective for desk-based staff.

Pre-recorded audio or video information sessions. These should be fairly brief, and ideally professionally-produced for optimal impact. They can be provided via the central library, or by using other platforms to suit the audience. Compiled programs could be provided on audio CDs for field staff on the road.

Fully-integrated elearning modules can also be used, but can be very resource-intensive to develop to an adequate standard.

Other potential tools may include podcasting for company and industrial news, intranet slide packs with audio or video for strategy presentations and senior management updates, mobile phone broadcasts for brief staff messages, and the introduction of blogging and RSS feed-readers for improved audience segmentation.

Content maintenance and ownership

The most critical issue in ensuring content currency is ownership. Each entry in the central library should have the name of one owner clearly – and publicly – recorded. The responsibilities of ownership include content accuracy and timely updates. To this end, the owner of each entry is ideally a subject matter expert on the content of the entry. This may be the original author of the content, or another expert as appropriate. All owners are also responsible for ensuring handover of their content to other relevant owners at times of staff movement.

Authors can be assisted in ensuring that their content is relevant to the target audience through the use of content templates, which should include full descriptions of the requirements.

To enable content owners to take full accountability, access to the content library should be made as easy and simple as possible. Owners should be able to access all features necessary for loading and updating their content, along with managing the status of their entries – uploading drafts, publishing and deleting at end of life. Relevant metadata should be entered at the time of entry creation, and kept as simple and automated as possible.

A key requirement for content currency maintenance is an agreed window for review of entries. For consistency and ease of management, a single window for all content types is preferable. Also critical is the ability to provide workflow capabilities to provide automated reminders to owners of entries requiring updating.

It is helpful to make a distinction between the entries in the content library, and the attached content stored in each entry in the form of a document or multimedia file. For effective management, each entry should contain only one attached file

Each entry should be reviewed at least once in every review period, even if the attached content may not require updating. Owners should be given at least two reminders to review entries by the due date. After the review date, the attached content in unreviewed entries should be "hidden" or archived, so that it cannot be used in error.

Workflow tools can provide for multiple levels of checking – for example, if an attached file is unchanged after two review periods, the owner may be prompted to enter an assurance that updating is not required, and the owner's line manger can be sent a copy of this assurance for their information. In order for the target audience to be kept fully informed of the status of content, both the date of last review of the entry, and the date of last update of the attached content should be displayed.

A C&IT company introduced a review window of 90 days across all content in an online document library housing around 3,500 entries. A further control was introduced to ensure that all entries were actually updated at least once every twelve months.

This was driven through including this in the existing management "scorecard" process.

Senior management of the process was critical to the success of this approach. Management reporting was also provided to track overall progress. Over a period of twelve months, the number of attached files unreviewed within 12 months was reduced from 27% to 7%.

The audience is watching

While content owners have key accountabilities, the ability of the audience to support this role should not be overlooked. By providing key information to the audience, such as entry status, and review dates, and a simple feedback form on each entry, audience members can play an important role in overall content quality. This is particularly the case where a number of audience members have some amount of relevant subject matter expertise.

Entries for content that have not been reviewed by the required date should be accessible (but the actual content hidden), to enable audience members needing the content to request that it be reviewed and made available. Any other comments on the accuracy and quality of entries can also be sent directly to the content owners. Readers may also be provided with a "rating" facility (for example, a one to five star rating) to provide public information on content quality.

While anonymous read access is desirable, the identity of all readers providing feedback should be captured – preferably in the background through the use of a single-sign-on or similar system – for later follow-up if required.

Dealing with knowledge hoarding

All content that is provided through the knowledge sharing toolkit should be aimed at meeting understood and agreed organisational objectives. Content contributors need to be able to understand the value of sharing their knowledge with others in an organisation. This value should be explained to contributors in terms that will make sense to them. Often, merely the fact that explicitly sharing as much of their knowledge as possible will reduce phone calls from those needing access to it is helpful.

The use of a coherent rewards and recognition program is useful, provided that rewards are very clearly linked to the objective value of the contributions made. Rewards may be linked to salary packaging or bonuses, but financial rewards are not the only relevant motivator. As much as possible, contributors should be given some sense of community, where recognition of key contributions can be made publicly through group communications or meetings.

Here is one example of how a knowledge sharing program was introduced as part of a new specialist sales and technology development group.

This program was introduced with a new internal branding campaign. A "knowledge points" system was introduced, where each person's contributions to the central content library and other sharing tools made over a period of time were aggregated. The total points earned by each contributor were then translated into a component of his or her salary package. Rewards also included a range of gifts, vouchers and branded merchandise. A community newsletter was used to announce achievements. A strong community spirit was developed. It was found that even after organisational change and the end of the branding campaign that a readiness to share knowledge continued.

Statistics on content use and other helpful information should also be provided. A clear expectation should be built from the outset that knowledge sharing is a fundamental part of each contributor's day-to-day job, and the organisational need of the audience to access this content should be stressed.

As discussed above, access to all knowledge sharing tools should be made as easy as possible, to ensure that no barriers are placed in the way of knowledge sharing. Where possible, the provision of content should also become part of standard business processes; for example, the provision of information to a sales force should be a required step in product development prior to launch of new products. This will require clear management support of the knowledge sharing toolkit.

The importance of Social Media principles

Knowledge Management as a discipline has been with us for some time, and Social Media is a relative newcomer. However, many of the principles at the heart of Social Media underpin an effective knowledge sharing toolkit. Some of the important aspects of community have been discussed above. The fundamental basis for all this is trust.

To this end, contributors must be allowed to take as much control of their content as possible. The more open all elements of the toolkit can be made, the more effective the sharing will be. While audit trails may be kept, these should be in the background, to allow contributors direct access to content without separate logins or authentication. In this author's experience, where this trust has been extended, it has been overwhelmingly honoured.

It is also helpful to start building a knowledge sharing toolkit in a contained environment – a "grass roots" or prototyping approach – to allow gradual development of the contributor community, and adaptation of the knowledge sharing tools to meet emerging audience needs.

However, there is a need for scalability; and progressive management endorsement of the toolkit is critical to ensuring long-term viability. The audience, as well as the contributors, should be continually engaged to ensure that real organisational needs are being met. This can be done with a range of survey and measurement tools, including Social Media tools, and direct feedback should be provided on actions being taken.

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