SMR International

Putting KM to Work

Building the Knowledge Culture:

The Knowledge Services Effect

by Guy St. Clair and Dale Stanley

SMR International
Management Action Plans for Knowledge Services

Putting KM to Work

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SMR INTERNATIONAL MANAGEMENT ACTION PLAN

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SERIES INTRODUCTION: KNOWLEDGE SERVICES AND THE KNOWLEDGE CULTURE

Since the early 1900s, organizations have struggled to identify and manage practical and utilitarian information, knowledge, and strategic learning. The 20th century continuum from information management to knowledge management to knowledge services now enables the knowledge culture.

It is now clear that the knowledge continuum which began early in the last century has brought a new understanding and respect for knowledge to the management community. By the early 1900s, business leaders were beginning to recognize that change was needed with respect to information management, knowledge management, and strategic learning (although these functions were not called that yet), and they began to give attention to distinguishing "practical and utilitarian" information from that sought for personal edification, educational purposes, or entertainment. As a result, the 20th century offers many examples of how workers in the sciences, business, and research struggled to deal with the information, knowledge, and strategic learning required to support their work.

By mid-century, business management had begun to take a hard look at how information was managed. Following World War II, the management of information (particularly scientific information) had reached a crisis point, and the struggle to deal with overwhelming quantities of information was on-going. Information science—as a new discipline for dealing with the situation—became a major influence. The management of information and the move toward the much talked-about "information age" provided many strong and lasting contributions to business management, but it did not seem to be enough. More effort was required, and by the last decade of the century, when Thomas A. Stewart identified "intellectual capital" as an important business assets, the evolution of knowledge management (KM) was well under way; organizational managers began to recognize that business success could be realized when the company's knowledge could be harvested and retrieved for business purposes. With the 21st century, knowledge services came onto the scene and was soon acknowledged as the *practical* side of knowledge management. As enterprise leaders sought to "put KM to work"—as the effort was characterized—they came to understand that with knowledge services, its value lay in its very practicality; indeed, with this practical approach to the management of information, knowledge, and strategic learning, managers came to understand that the organization has the advantages of higher-level research, strengthened contextual decision-making, and accelerated innovation.

With a practical approach to the management of information, knowledge, and strategic learning within the larger organization, the company realizes the advantages of excellence in knowledge asset management, strengthened contextual decision-making, accelerated innovation, and higher-level research.

Knowledge development and knowledge sharing (KD/KS) leads to an environment in which success at all levels is supported by a willingness to share information, knowledge, and strategic learning.

The new emphasis on the role of knowledge in the operational environment turned out to be a different way of looking at the organization's intellectual assets, its collective knowledge. As a result, knowledge development and knowledge sharing (KD/KS) is now clearly desired in the modern, well-managed organization. Enterprise leaders recognize that the knowledge-*centric* organization is one in which success at all levels is supported by a willingness to share information, knowledge, and strategic learning developed within or for the organization. A beneficial side effect has been that transparency

(that is, openness and a lack of "hoarding" in transactions having to do with information, knowledge, and strategic learning) is now understood to be for the common good, and the old days of "information power" seem to be gone. Thus for many with management authority, KD/KS becomes a necessary ambition. If the larger goal of the organization is to achieve success (however success is defined in the specific operational environment), understanding that the data-information-knowledge-learning-sharing construct can be directly applied in the KD/KS process becomes a valuable component in enterprise success, enabling quality management with respect to the organization's information, its knowledge assets, and the arrangement of its strategic learning programs (both formal and informal learning programs).

The Organizational Knowledge Culture. All of these knowledge-focused elements come together in knowledge services, the management and service-delivery methodology that converges information management, knowledge management, and strategic learning. With this convergence, the enterprise moves to what we recognize as a *knowledge culture.* It is a much desired state of affairs, this knowledge culture, if the comments and aspirations of many in the management community are taken at face value. It is not unusual in situations in which an organization is conducting a knowledge audit or developing a strategic plan for knowledge services for there to be reference to a knowledge culture, as in "What we need in this company is a culture that helps us use what we know," or "How can we change the culture of the organization so our workers understand the value of sharing the knowledge they develop?"

The obvious response to questions like these is knowledge development and knowledge sharing, but as is pointed out by many leaders in the field, KD/KS does not happen automatically. In fact, some managers are reticent about KD/KS and demonstrate a certain skepticism about the idea of a knowledge culture, asserting that KD/KS cannot be directed but must evolve from a willingness on the part of all players to share the knowledge they bring to the process (or develop). Of course. The whole point of knowledge management, knowledge services, and building and sustaining the knowledge culture is to move *away* from the command-and-control management framework, and it can be safely asserted (certainly it is the belief of the present authors) that the *purpose* of knowledge services is to create an environment for a knowledge culture in which the willingness of all enterprise stakeholders to share knowledge is fundamental and a given.

It is not such a stretch, this quest for a knowledge culture. For many years organizational leaders have lamented the fact that much information, knowledge, and strategic learning is not shared, and that this lack of sharing inhibits good workplace performance. At the same time (particularly since the growth of KM and management's interest in KM over the past two decades), the informal sharing of information, knowledge, and learning—the famous "water-cooler" or "elevator"

Enterprise leaders recognize that conversation, collaboration, and cooperation are natural elements in the knowledge-centric organization and contribute to the role of knowledge services as a critical operational function.

conversations—has led to great efforts in attempting to identify elements of these sharing activities that can be developed into management principles. Adding to the interest in knowledge services has been the development and acceptance of a management style that recognizes the value of conversation, that collaboration and interactive cooperation are all basic building blocks in the knowledge-centric organization and contribute to the successful deployment of knowledge services as a practical and utilitarian methodology supporting the development of a knowledge culture.

The knowledge culture has been defined and its attributes listed. Just as culture itself is an accumulation of shared beliefs and values within a particular population, so, too, is the knowledge culture an accumulation of shared beliefs and values—most often within an organization or other group of people—about knowledge and the application of knowledge for that organization or group's success. Within the knowledge culture, specific attributes (identified by one of the present authors) apply. These are:

The attributes of the knowledge culture are described in more detail in the Epilogue to *SLA at 100: From Putting Knowledge to Work to Building the Knowledge Culture*, by Guy St. Clair (Alexandria VA: SLA, 2009).

1. Strength in collaboration (with no disincentives to collaborate)
2. Respect for and support of the integrity of the knowledge process, with an emphasis on transparency (except in clearly defined situations requiring proprietary discretion or security), honesty, and trust
3. Focus on the larger organizational role and the benefits for the larger organization (not on individuals or individual departments)
4. Professional allegiance to the organization or enterprise; allegiance to an external influence, such as a profession or a school of thought or a political, religious, or social philosophy, is secondary
5. Enthusiasm for information technology and communication in the knowledge development and knowledge sharing (KD/KS) process
6. Respect for and enthusiasm for knowledge services as a management and service-delivery methodology
7. Respect for the intellectual foundation for the effort; the intellectual quest is not disdained
8. The recognition that intellectual capital is an essential and critical organizational asset and that KM—however defined—is a legitimate functional operation in the organization.

Information Professionals: Change Agents for Knowledge Services. For the information professional, the management employee with responsibility for knowledge services, there is a very specific role in the organizationalc knowledge culture. That manager—who in some environments is referred to as a "knowledge services manager," "specialist librarian," "research assets manager"—maintains beliefs and values about knowledge that build on and connect with an understanding of the organization of information, knowledge, and strategic learning and of how those disciplines converge for the benefit of the larger enterprise. Information professionals also have a clear

With respect to knowledge services, the organization's information professionals are its natural managers. They understand the relationship between knowledge and technology and make the connection between strategy and system development.

Knowledge services is knowledge catalysis. Once knowledge has been developed, value is created through KD/KS, resulting in opportunities that produce tangible results.

understanding of the relationship between knowledge and technology. They are eminently qualified (probably better than any other group of workers in the organization) to make the connection between strategy and the planning, design, and implementation of information, knowledge, and strategic learning systems. They are thus positioned, these information professionals, for playing a leading role in delivering knowledge services, the *practical* side of KM, and for putting knowledge management to work in support of the larger organizational mission.

It is an important distinction, this knowledge services leadership role for information professionals, and one that has been identified in the competencies statements published by SLA, the international membership association for information professionals. Recognizing that they are employed in organizations that deliver "information-based solutions to a given market," these information professionals identify themselves as knowledge thought leaders for the organization. Their workplace (variously defined as a research center, a specialized library, an information center, a competitive intelligence business unit, an intranet department, a knowledge resource center, a content management unit, *etc.*) is positioned to be the organizational *knowledge nexus*, if that is what enterprise leadership wants for the organization. The management of that function (which we generally categorize as a "knowledge services business unit") falls particularly within the professional domain of these knowledge workers. They have the professional expertise, skills, and competencies to provide an over-arching and holistic knowledge asset management framework for the organization, enabling the many pieces of information, knowledge, and strategic learning scattered throughout the organization to connect and work together for the common good. These same skills and competencies ensure that these information workers understand their responsibility to ensure that excellence in KD/KS is provided for the knowledge culture upon which the larger enterprise is built. They are professionally committed to take whatever path is required to achieve that excellence.

As knowledge thought leaders, these information professionals take seriously their leadership role, and in bringing knowledge integration to the larger organization, they carefully distinguish between knowledge management and knowledge services. They understand that "knowledge management" is sometimes an inappropriate descriptor, and recognize that knowledge *per se* cannot be managed, although—as is often described—KM can be characterized as *working with knowledge*, for example, or as managing the knowledge *eco-structure*, or as knowledge *searching*. For Dale Stanley, another of this Management Action Plan's authors, the most practical approach is to focus on knowledge services. Instead of attempting to define KM, Stanley advises organizational management to move to knowledge services, considered by some to be very close to or the equivalent of the KD/KS process: "Knowledge services can be considered *knowledge*

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catalysis," Stanley says. "That is, once knowledge has been developed, value is created by facilitating an interaction (knowledge sharing) among those who have knowledge and those who need to work with knowledge. It is the creation of knowledge *value* through KD/KS, finding and leveraging opportunities that produce tangible results."

Information professionals are the natural employees for creating knowledge value for they are, if nothing else, true knowledge, information, and strategic learning catalysts.* They clearly understand the place of positive change in the workplace and they express no doubts about their role in the creation of knowledge value. Indeed, information professionals—whether known as knowledge specialists, specialist librarians, or by any of the many other job titles applied to them as knowledge workers—have long distinguished themselves in providing added value to the information, knowledge, and strategic learning delivery process.

Like Stanley, Alvin L. Jacobson and JoAnne Sparks recognize the value creation objective. They demonstrate that it is through the successful management of the "strategy-focused" knowledge services business unit that creating knowledge value is realized. Jacobson and Sparks take the position that to begin the process—whether for knowledge services or any other element of knowledge management and knowledge services—information professionals must identify and work with four essential elements in the process:

1. Determine the central value proposition and objectives of the plan
2. Conduct an opportunity assessment of existing services, projects, technologies, and skill sets against the value proposition
3. Build strategic maps that show how you plan to get from where you are today to where you want to be tomorrow
4. Design and implement a measurement system that will monitor ongoing performance to plan and enable "mid-stream" corrections.

The key element, of course, has to do with change, and the importance of embracing change for the good of the larger enterprise. As became evident during the last years of the 20th century—when information management was evolving into KM and then into knowledge services— and as knowledge services now moves into supporting the development of the knowledge culture for businesses and organizations, the ability to move fast and to generate tangible returns becomes critical to organizational success. These qualities—speed of delivery and ROI— are no less true for knowledge management and knowledge services than for any other management tool, and it is through the application of change management principles that speed of delivery and ROI are achieved.

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* Recognizing this leadership role, and to encourage clarity and consistency, the authors use the term *knowledge services director* to describe the information professionals who have operational responsibility for the management and delivery of knowledge services.

> Every information professional seeking to lead knowledge integration in the organization must master change management.

While the term "change management" has become something of a cliché during the past few years—perhaps from overuse but just as likely from its characterization as something few managers want to deal with—the concepts that underlie change management continue to be valid and important in organizational management. For every information professional interested in leading the organization into a knowledge integration "mode" as the organization transitions to a knowledge culture, mastering change management becomes, in and of itself, a critical management tool. As long ago as 1991, it was being asserted by David S. Ferriero and Thomas L. Wilding that organizations must be in a constant state of openness to change if they are going to maintain a high degree of relevance. Thus change aimed at maintaining corporate relevance can be seen as both desirable and inevitable, an idea that has probably contributed to the "mantra" that has come to guide information and knowledge thought leaders in the company. Indeed, recognizing the desirability and inevitability of change and developing (or employing already developed) skills for building a foundation for change, for managing resistance, for encouraging participation, and for creating methods for rewarding and recognizing enterprise stakeholders who successfully embrace KD/KS have become major factors in determining knowledge services success. They lead directly to KD/KS. They bring attention and credibility to the importance of understanding and utilizing change management (however the activity is designated in the workplace) in the development of the knowledge culture, and they should not be underestimated.

Thus as we look to the development of a knowledge services focus for the larger organization, we consider a number of underlying themes:

- the extent to which the enterprise is perceived and enabled as a knowledge culture by all its stakeholders (and in particular the organization's managers and leaders, exemplified by their participation as sponsors in the management of an enterprise-wide knowledge services strategic framework)
- perceptions of value with respect to knowledge and the role of knowledge services in the creation of business value
- elements of organizational success at play in the larger enterprise and how these are monitored and measured
- change management and change implementation as an operational construct.

When these themes are recognized as part of the organization's functional structure and all enterprise affiliates understand how they affect organizational success, attention to a strengthened knowledge services focus can begin and the knowledge culture—elusive until now and thought, perhaps, not to be possible—is at hand.

AUTHORS' INTRODUCTION

Knowledge management and the provision of knowledge services are now acknowledged as critical to organizational success, but that has not always been the case. Indeed, it has been only in the last two decades or so that management attention has been directed to the benefits of excellence in knowledge management, but now that enterprise leaders understand the business value of knowledge, this first decade of the new century is offering important new opportunities for dealing with organizational information, knowledge, and strategic learning (which opportunities themselves could be characterized as KD/KS). Indeed, thanks to advances in information technology and the elevation of knowledge capture to an operational function subject to scientific study and professional management, the functioning of knowledge services in the organizational workplace is no longer a desirable but remote aspiration.

What we have with knowledge services, of course, is but one element of the ever-expanding organizational attempt to "manage" knowledge, to get a handle on the information, knowledge, and strategic learning required for success in every organization, regardless of size of the organization or its subject focus or functional purpose. As with other activities associated with knowledge management, identifying strategies for success with knowledge services has moved high up the list of priorities for any person with management responsibility, whether for an entire organization or for one of its functional units. Knowledge services is now understood to be a central element in knowledge asset management, and the whole KM/knowledge services "package" is now recognized as critical to organizational success.

As with all operational functions, knowledge management and knowledge services cannot contribute to organizational success unless high performance standards are achieved, an objective clearly linked to planning (and the impetus behind this series of Management Action Plans). In the modern workplace, performance does not just "happen." The very embodiment of performance in the workplace has to do with the planning process: determining expectations, the development of goals and objectives, and the implementation of strategies to achieve those goals and objectives. So it is with knowledge services. We must consider, we must discuss with colleagues what we are seeking to do, and we must carefully and thoughtfully give attention to what we want the knowledge services role in the organization to be. It is our expectation that the concepts and direction presented here, especially the discussion questions, will help each reader approach knowledge services with confidence.

No organization can succeed and grow until its organizational culture includes an understanding that success depends on the ability and willingness of all stakeholders to develop and share knowledge. The purpose of this Management Action Plan—and the others in the

series—is to provide information professionals and other knowledge thought leaders practical advice for achieving that success. The authors' premise is that an organizational knowledge culture is essential for the achievement of the organizational mission, whatever that mission is or however it is expressed. With this plan, the goal is to develop a strategic framework for knowledge services, to ensure that knowledge services is managed as well as it can be managed in support of the knowledge culture.

For each subject presented in these Management Action Plans, we offer background about the subject in terms of its connection with knowledge services, a description of practices associated with the subject as it applies to knowledge services, discussion questions identifying and codifying specific concepts, situations, and needs directly related to the reader's workplace, and a format for an action plan to be used to organize and frame specific activities to be undertaken by the knowledge services manager and staff. Three sections included in each of these Management Action Plans do not vary much from plan to plan, as they apply to all of the subjects described: this introduction, the series introduction—which presents the reader with general background information about knowledge services—and the afterword, our comments and thoughts about the place of change and the role of change management in the modern knowledge-centric enterprise. Whether we are comfortable with admitting it or not, this last is the basis of our success in all we do in the workplace, and it is the authors' firm belief that attention to the principles of change management and change implementation is critical to the success of any undertaking having to do with knowledge services.

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How to Use this Management Action Plan

1. Read the Series Introduction to determine if you are in agreement with the perspective or point of view described. The emphasis here is on the value knowledge services brings to the organization, the role of knowledge itself as an organizational asset, and the need for the development of a knowledge culture or the enhancement of an already existing knowledge culture in support of KD/KS in the larger organization

2. Thumb through the essay "Building the Knowledge Culture: The Knowledge Services Effect" and identify sub-topics to focus on later

3. Review the Afterword ("Managing Strategic Change") and think about how these change management concepts align with the organizational culture where you are employed

4. With your colleagues, read over the discussion questions and come up with talking points to use as you develop your plan. Record your responses to the questions and meet together to brainstorm about how these apply in your workplace

5. Follow this with an in-depth review and discussion about the elements of developing a knowledge services strategic framework

6. Return to the essay "Building the Knowledge Culture: The Knowledge Services Effect" and read it in depth, now with a view to learning concepts for developing a strategy for restructuring the organization as a knowledge culture

7. Using the action plan format included in this document, commit to the basic action items for implementing your plan

8. Initiate your plan for building the knowledge culture and for using your knowledge culture strategy for achieving that objective.

As with any management tool or technique, there are a variety of ways to implement planning activity. Those presented here necessarily represent the experience of the authors, with emphasis in those areas given focus in their work. Other practitioners might weigh different topics or directions, but the final result, in all cases, should be a planning guide that will support the organization as it seeks to provide excellence in the management and delivery of knowledge services.

BUILDING THE KNOWLEDGE CULTURE:
THE KNOWLEDGE SERVICES EFFECT

The transfer of information, knowledge, and the application of strategic learning are fundamental to workplace success. Knowledge services is the management and service delivery methodology that enables that transfer, and thus enables organizational success.

Knowledge services is the management and service delivery methodology that enables organizational success. The transfer of information and knowledge and the application of strategic learning are fundamental in any workplace activity that results in success. Whether that success is related to an individual employee's performance as a single task is accomplished, attaches to the success of the performance and contribution of the business unit with which that employee is affiliated, or combines with enterprise-wide activities in support of the larger organizational mission, it is in the convergence of information management, knowledge management, and strategic learning—the discipline we refer to as "knowledge services"—that success is realized. Connected with workplace efforts that evolve through knowledge development and knowledge sharing (KD/KS), knowledge services is considered the *practical* side of knowledge management. We describe knowledge services as the workplace activity that knowledge workers use to put KM to work. Its influence in the workplace is seen through the success of knowledge services in facilitating better contextual decision making, accelerated innovation, higher-level research (for those organizations engaged in research in one way or another), and improved knowledge asset management.

As such, knowledge services forms the basis of an agreeable operational scenario. As the practical side of KM, and supporting as it does KD/KS at all functional levels of the enterprise, the effect of knowledge services is the ongoing functioning of an enterprise in which organizational development and organizational effectiveness are by definition structured around the development and sharing of enterprise-related knowledge. In this (obviously very idealized) circumstance, the effect is a very particular one: the organization performs as an environment or an ambience in which KD/KS is the "normal" way of doing business. The transfer of knowledge, information, and strategic learning content is integrated into the successful management of the organization and supports its operational structure, and attention to the organization's intellectual resources and capabilities is incorporated into the enterprise business strategy. The daily lives of all people affiliated with the organization are affected by how well knowledge services is managed, and when knowledge services is well managed, the enterprise functions as a knowledge culture.

But that idealized description must be tempered with a heavy dose of reality, and addressing that reality is the purpose of this Management Action Plan. The knowledge culture—even if such a culture is already in place—does not happen automatically or from some higher altruistic motivation. Developing a knowledge culture (where one is not already in place) and sustaining the knowledge culture require the confluence of a number of different elements, none more important than the standard of leadership in place in the larger enterprise. Yet a critical factor

affecting the presence of an organizational knowledge culture is that most people affiliated with the enterprise do not—either knowingly or unknowingly—think much about the role of knowledge in the success of their efforts. Indeed, in the past few years there appears to have been in some layers of society almost an avoidance of consideration in this direction. Any attention to the role of knowledge in the achievement of success—whether in the workplace or in any other element of society—was avoided and, sadly, sometimes even disdained.

As the new century moves into its second decade, the tide is turning, thanks to the efforts of many who work with intellectual capital and who have for the last generation or so given much attention to educating enterprise leaders about the importance of incorporating attention to knowledge management into the overall management structure. And, to be fair, much attention to knowledge management has emanated from the academic community, connecting what we refer to as KM/knowledge services to organizational development and organizational effectiveness, with a particular emphasis on information management, information technology, and similar fields of endeavor in which information science—as the medium for delivery—links to enterprise success.

> It is beginning to appear that the emphasis on organizational effectiveness is requiring renewed attention to the value of knowledge in the workplace.

Without being too optimistic, it is even beginning to appear that within the organizational management community the emphasis on organizational effectiveness is affecting the way knowledge workers (and other organizational affiliates) think about knowledge, perhaps ushering in a new day for these workers. Might this be the dawn of a new era, a new "golden age" of knowledge development and knowledge sharing in a new society in which excellence in KD/KS becomes recognized as a driver for success? Of course the much-discussed "information age" will be with us for a long time to come, but might we now be seeing signs that the information age is transitioning to a new "knowledge age"? Is, perhaps, a new way of thinking about the *value* of knowledge taking hold?

If this is the case (and there are those of us who assert that it is), it would be a natural "fit"—in this time and at this particular place in history—for knowledge workers to take on the responsibilities of building and sustaining the knowledge culture for their employing organizations. Indeed, in today's workplace the working environment is one in which information and knowledge professionals are ideally positioned to lead this effort. In very specific terms, there are two opportunities before today's knowledge professionals. The first is the opportunity to use their skills, education, and their collaborative talents to strengthen the relationship between technology and knowledge in the organizations where knowledge workers are employed. The second is the opportunity knowledge professionals have to bring their own management and professional expertise into the larger organization, moving from individual departments and business units to take on enterprise-wide responsibility. They do this by moving into enterprise-

wide knowledge asset management, the management discipline that takes its roots from asset management, knowledge management, and systems thinking. With this effort, knowledge services advances into a functional area that has not been embraced before, one that knowledge professionals are particularly qualified to initiate and implement, curating and managing content across the organization. In many respects—although the discipline is not quite there yet—the critical knowledge services function now is to take ownership of the organization's knowledge assets and provide management and service delivery from an enterprise-wide perspective. The limited points of view of the past—when information, knowledge, and strategic learning were managed from the perspective of a particular business unit or section of the organization, an external professional allegiance, or other limiting point of view—are fast falling out of favor.

Nevertheless, the reality that must now be addressed is how to take advantage of this new thinking about knowledge and how, specifically, to match the company or organization's business strategy with a knowledge strategy that acknowledges and incorporates the components of the knowledge culture. This Management Action Plan has been designed to provide guidelines for putting together a strategic framework for developing and sustaining an organizational knowledge culture. Not so coincidentally, in the process of making this effort, knowledge professionals are provided with the opportunity to move into their appropriate role as knowledge thought leaders for the enterprise with which they are affiliated.

> The critical challenge is how to take advantage of new thinking about knowledge and match the company's business strategy with a knowledge strategy that incorporates the components of the knowledge culture.

KNOWLEDGE LEADERSHIP: A FRAMEWORK OF FACTORS

> **The Knowledge Leadership Framework of Factors**
>
> Leadership
>
> Collaboration
>
> Breadth of Scope
>
> Management Enthusiasm and Support
>
> Value Creation

What is being described is nothing less than a leadership opportunity for knowledge services professionals, an opportunity supported by a framework of factors that enable success in building and sustaining the knowledge culture. Closely matching the attributes of the knowledge culture described in the first essay of this management action plan (page 7), our framework of factors stands firmly on two major pillars, leadership and collaboration. Without either leadership or collaboration, the knowledge culture cannot come into being or, if it already exists, it cannot survive.

Still, our framework of factors does not stop with leadership and collaboration. We also propose breadth of scope, technology and communications maturity, management enthusiasm and support, and value creation as factors that support the knowledge culture and enable its success. We also note that from the perspective of the knowledge services professionals engaged in these efforts, these factors combine to position knowledge professionals for moving into their role as knowledge thought leaders, and from that position to smooth the progress of the knowledge culture as it is developed and maintained.

LEADERSHIP

The framework of factors starts with leadership, the quality that stands at the forefront of the many talents, skills, and abilities that combine to enable excellence in organizational effectiveness. Leadership also affects management and service delivery in the organization's various business units, including those relating to the management of information, knowledge, and strategic learning where, as we know by now, the knowledge culture connects with the leadership skills of the knowledge services director. Working with his or her team of knowledge workers, the knowledge services director seeks to develop a knowledge strategy in which "adaptive work," as Ronald A. Heifetz and Donald L. Laurie have described it, is undertaken. This, they contend, is "the work" of leadership, to direct the workforce to respond to changes in society and in the workplace by developing new strategies, learning new ways of operating, and, significantly, reviewing and clarifying workplace values. Connecting the idea of adaptive work with the environment in which knowledge services is managed and delivered could constitute an almost classic description of the challenge enterprise leadership faces. As the organization struggles with changes taking place at almost every level and in almost every job—with economic dislocations, with mergers and acquisitions and bankruptcies, with new and unsettling HR regulations, with continually improving technology, and with new approaches to knowledge access evolving at a rate of change unimagined just five years earlier—managers must constantly observe and make judgments about the effectiveness of the KD/KS process.

In taking that challenge to the next level, to direct our attention to the role of leadership in developing and sustaining the knowledge culture— the subject of this management action plan—it is helpful to understand that how leadership is defined and succeeds is connected directly to the particular situation for which leadership is required. Thus each organization employing a knowledge services director will have different and often unique requirements that must be identified and responded to, one of the most difficult tasks of the leader with management and delivery responsibility for knowledge services. As a knowledge thought leader, though, a leader we might define as a person whose performance is grounded on and matches philosophically the organization's value proposition for knowledge services, the knowledge services director is in a strong position to lead the effort. It was Edgar H. Schein in his classic *Organizational Culture and Leadership* who determined that the leader as a "creator of culture" succeeds in doing so by transferring "beliefs, values, and basic assumptions" to subordinates. Schein identified three ways in which the process of building culture occurs. As we seek to determine direction for building the enterprise-wide knowledge culture, we use these to establish our own "knowledge culture-building" context (as we might call it):

1. The knowledge services director and the culture building team (that is, the people who share the same knowledge values and ambitions as the knowledge services director) think and feel the same way about the purpose and value of the organization functioning as a knowledge culture.

2. Through knowledge-sharing and strategic learning, the culture building team indoctrinates and socializes others in the organization—especially others in positions of authority or influence or both—to their way of thinking and feeling.

3. Likewise, through knowledge-sharing and strategic learning, the knowledge building team and these other organizational knowledge thought leaders serve as role models, with their behavior inspiring others affiliated with the enterprise to identify with them and to accept the beliefs, values, and assumptions of these leaders.

In sustaining the knowledge culture, similar forces drive the knowledge services director and those associated with the creation of the knowledge culture (which, it should be acknowledged, is in many cases nothing more than the discovery, codification, and restructuring of an intellectual infrastructure that is already in place). For the task of sustaining or maintaining the knowledge culture, the challenge is one of ensuring that the components of knowledge services—the tools as well as the knowledge sharing and the strategic learning—are designed to "fold in" to the usual, daily, and non-exceptional elements of the workplace. At the same time, those with responsibility for and interest in the ongoing success of the organization as a knowledge culture take it upon themselves to mentor, train, and otherwise encourage continuing interest in knowledge services and the KD/KS process as a workplace standard. Finally, above all else, the knowledge services director and the team that has developed or overseen the recognition of the enterprise-wide knowledge culture must do all they can to prevent the growth of organizational processes that would impede interest in sustaining the knowledge culture; every effort must be made to ensure that all affiliated staff—but most particularly younger staff—are given every opportunity to be part of sustaining an organizational environment in which knowledge services and KD/KS thrive.

Knowledge Leadership

The purpose of knowledge leadership is to ensure that knowledge services and the KD/KS process are managed for the benefit of knowledge *use* and that knowledge *value* is conveyed back to all enterprise stakeholders.

Which means that leadership required for maintaining and sustaining the knowledge culture must have a different focus, one which—as in most leadership roles—combines leadership and management but in this case also has a specific direction. It is a type of leadership we characterize as "knowledge leadership," for its primary purpose is to ensure that knowledge services and the KD/KS process are managed for the benefit of knowledge *use* in the organization and that knowledge *value* is conveyed back to all enterprise stakeholders. Thus the usual distinctions of leadership and management (which Abraham Zaleznik adroitly characterizes as "the same only different") become less about contrast and more about similarities, and we see the knowledge services director exhibiting characteristics of both the leader and the manager.

Zaleznik, for example, suggests that management is power *by position* and of course the manager of a knowledge services business unit is in place to manage. At the same time, Zaleznik posits that leadership is power *by influence* and as has been noted here, and throughout these management action plans in general, it is the influential role of the knowledge services staff to provide guidance and direction not only in assisting other organizational colleagues as they deal with their day-to-day knowledge services needs, but to take control, indeed even take ownership, of the organizational knowledge strategy and assure its implementation.

The twinned elements of knowledge leadership can be seen in another iteration, one that seems almost unique in the general organizational management picture but is the accepted standard in the management and delivery of knowledge services. In Zaleznik's dichotomy, managers are planners and focus on process. Leaders are "inspiring visionaries who focus on substance." Combining these, could there be a better description of the work of the knowledge director? This leader's primary responsibility—a two-part responsibility—is to define the knowledge culture for the larger enterprise and to pave the way for restructuring the enterprise as a knowledge culture. In doing so, the knowledge services director is challenged to identify and master the two types of knowledge required in the workplace, which Hatten and Rosenthal have written are the knowledge to boost performance when organizational objectives are known and understood and the knowledge to help define new objectives and identify the strategies to pursue them. Both are the domain of the knowledge services director and both require planning and a focus on process, the manager's tasks, and vision and a focus on substance, the leader's tasks. The knowledge services director combines them in knowledge leadership.

It is the job of knowledge services professionals, including the knowledge director, to smooth and accelerate the progress of KD/KS in the larger organization, providing knowledge leadership. In providing a knowledge framework for the company or organization, permitting improved contextual decision making, accelerated innovation, higher-level research, and excellence in knowledge asset management, knowledge services professionals ensure the continuation of organizational success. It was a point made by Kevin Manion, then the Associate Director for Strategic Planning and Information Services at Consumers Union in Yonkers, NY:

> We have a responsibility to our organizations to provide knowledge leadership…. We have the ability, the knowledge of concepts, and many of us have the skills, and that's where knowledge leadership in the organization comes into play. It's a role we have to play, whether it's expected of us or whether we take it. It's in the workplace that we see—and act on—the connection between the organization's intellectual capital and the organization's success.

Knowledge Leadership

The knowledge services director—as knowledge thought leader—has a two-part responsibility:

1. to define the knowledge culture for the larger enterprise
2. to pave the way for restructuring the enterprise as a knowledge culture

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At the same time, knowledge leadership can also lead to knowledge services ambition, the ambition that is rooted in ensuring that all parties have the tools, services, and consultations they require as they seek to manage their contribution to the success of the organizational mission. Victoria Harriston, who manages the George E. Brown, Jr. Library of the National Academies of Science in Washington, DC, is absolutely certain that the more knowledge services can be moved *across* the larger enterprise, the better:

> I want to embed knowledge services in every part of the organization. That's my goal. And I particularly want knowledge services to be a critical component in the high-profile parts of the organization. I want the knowledge services staff to partner and collaborate everywhere we're needed. That the strategic direction I've chosen and it's what I'm trying to bring to the National Academies.

For knowledge services directors and the people who have agreed to come along with them in building and then sustaining the knowledge culture for the organization, the path is clear. There is the recognition and an acknowledgement of the value of enhancing a knowledge leadership role, one that combines the planning and process-orientation skills of the manager with the visionary focus of the leader. There is a clear understanding of the organization and of the *organizational* culture, the value of information, knowledge, and strategic learning, and the functioning of the KD/KS process within the organization. And, regardless of one's individual management or personal leadership style, there is the requirement for a passion or high-level enthusiasm for the entire knowledge-transfer process, a passion that carries over into every interaction with organizational affiliates and distinguishes the knowledge services director as an enterprise-wide knowledge thought leader.

So with little deviation from our quest for a strategic direction for building and sustaining an organizational knowledge culture, we can identify the role of the knowledge services professional in the KD/KS environment. This employee in fact has four functions, serving as a knowledge services authority for all organizational affiliates, acting as a knowledge facilitator or consultant for those who require guidance beyond "good enough" research and data-gathering; providing in-house expertise on all matters relating to the management of information, knowledge, and strategic learning, particularly in terms of how those disciplines converge in the delivery of knowledge services; and performing as a knowledge coach for people for whom the development and sharing of knowledge are not necessarily high-performance criteria as they consider the work they do.

In the knowledge culture, the strategic position of the knowledge services professional is simply to lead KD/KS. Naturally that work relates to the roles listed above, and build upon core responsibilities which are basic: to identify knowledge needs, to analyze, synthesize,

and interpret knowledge content, and to facilitate client utilization. In working with the knowledge services director in the development of the knowledge culture, the knowledge services professional is particularly well qualified but there are others, as noted before, who possess these same qualifications and they, too, can be conscripted to join the knowledge culture building team. Why? Because much of what brings success, when a group of people are called together to perform a task, are basic KD/KS sharing skills, skills that many people share. The following have been identified as required in the KD/KS environment:

- Trust

- Collaboration (with no disincentives for collaboration)

- Collegiality

- Concentration on relationship building

Equally important, there is the nice assumption that while the work being done is important work, the goal is to make it part of the everyday worklife of every employee in the organization. Once the enterprise is functioning as a knowledge culture, KD/KS and the elements of the knowledge culture are assumed into the usual habits of all workers. In the knowledge culture, knowledge development/knowledge sharing is not something "extra" to be given attention in addition to one's "regular" work; it becomes integrated into the daily workflow of each knowledge services professional. Or, as one colleague asserts, KD/KS is simply "part of your desktop."

So now we have the issue of the person employed in knowledge work, the knowledge services professional. Just how "professional" is that employee expected to be? And how is "profession" to be defined anyway? For many people connected with knowledge services, either as service providers or as consumers of services on offer, the question is moot. Background, training, education, affiliations within the professional community, and the famous networking between and among knowledge workers is in most cases not as important, either for senior managers who have administrative authority over the knowledge services workers or the customers and clients who make use of the services their knowledge services business unit provides. For these people, in both categories, the best knowledge services professionals are those who understand the needs of the larger organization, who are adept at applying intellectual and professional vigor to advising and directing clients who require this level of attention, and who are skilled at knowledge asset management, ensuring that the curating and use of the company's knowledge assets meets the highest standards of impact and service delivery.

The role of the professional employee who does this work, the knowledge services professional, has evolved over the past few years from Drucker's famous "knowledge worker" through a variety of related disciplines, sometimes concurrently and sometimes separately. As a result, the concept of a knowledge services *professional* connects

with and often parallels that of the many other professional fields that relate to information management, knowledge management, and strategic learning. These knowledge workers might be described variously as an information professional, an information scientist, an information technologist, a documentalist, a specialist librarian, and/or as one of the many other employment titles by which the knowledge services professional is recognized. Some are possessed of graduate education which is, of course, invoked in their work as knowledge services professionals. Some have other credentials, including subject specializations in which their expertise in the information, knowledge, and strategic learning content of the subject makes them the knowledge specialists for the organization. In all cases, the value of these employees relates to their ability to understand and pass judgment on the organization's knowledge services needs and in doing so advise about the organization as a knowledge culture to its senior leadership.

As for their services as knowledge thought leaders for the larger organization and their role in building and sustaining the knowledge culture, modern knowledge services professionals possess (or are expected to possess) a specific collection of attributes:

- Personal and professional competencies
- Intellectual background
- Organizational framework
- Common strengths
- Service-delivery perspective

Connected with these attributes, the knowledge services professional serving as the knowledge thought leader for the larger organization easily demonstrates analytical thinking in the management of the organization's intellectual assets. Built into the position is a commitment to continually make decisions about the management and delivery of knowledge services from an entrepreneurial perspective, and with a clear and positive understanding of the future results of entrepreneurial decisions. Systematic operational skills come into the picture, of course, linking directly to the value of measuring the results of decisions against expectations through organized, systematic feedback.

In assuming organizational leadership for the strategic management and implementation of knowledge services, the knowledge services director in particular and all knowledge services staff put into practice five actions associated with leadership, identified by Kouzes and Posner. By understanding and demonstrating the purpose of KD/KS in the organization, they "model the way," the first of Kouzes and Posner's directives for leaders. They also, as knowledge professionals and especially as organizational knowledge thought leaders, inspire a shared vision about the role of and expectations for knowledge and knowledge value in the larger organization. They are skilled, these knowledge

services professionals, in challenging the processes, recognizing immediately the impediments and hindrances that have a way of "sneaking in" when the service being delivered relates to information, knowledge, and strategic learning. As managers and, indeed, simply as collaborative and cooperative stakeholders in the achievement of the mission of the larger enterprise, as discussed below, knowledge services professionals understand and actively perform as advisors, consultants, and instigators but in their case, with the purpose of enabling others to act. Finally, as Kouzes and Posner put it, the leader "encourages the heart," meaning the leader has an obligation to establish and carry out policies, plans, and procedures that enable others in the organization to take pride in their own success as they pursue their knowledge-focused objectives. Thus the transition from knowledge services professional—under the authority and encouragement of the knowledge services director—to knowledge thought leader is not as big a step as it might at first seem to be. Taking the step simply requires that knowledge professionals focus their attention on doing—and doing well—what they have always done, recognizing that their skills for managing and delivering knowledge services positions them for a natural transition to knowledge thought leader.

In building and sustaining the knowledge culture, leadership is but one element of the construct that ensures its reality (*albeit*—it can be admitted—leadership is the most critical and essential attribute of those who would move the organization forward into a knowledge culture). Obviously those affiliated with the organization who support the development and continuing maintenance of an organizational culture understand the necessity of strong leadership, and the commitment to leadership of all with organizational responsibility—including the knowledge services director—ensures the success of the effort.

COLLABORATION

Our framework of factors follows leadership with collaboration, for knowledge development and knowledge sharing—the very core of knowledge services—is by definition a collaborative act and the KD/KS process is the foundation of knowledge transfer in the knowledge culture. This is a point well made by Edward M. Marshall, who in his work as an authority on the collaborative workplace, asserts the importance of collaboration as a management methodology:

> Collaboration is a principle-based process of working together, which produces trust, integrity, and breakthrough results by building true consensus, ownership, and alignment in all aspects of the organization…. Put another way, collaboration is the way people naturally want to work…. Collaboration is the premier candidate to replace hierarchy as the organizing principle for leading and managing the 21st century workplace….

> **Collaboration**
>
> Collaboration is the particular expertise of the knowledge services professional … Using relationship skills is standard operating procedure for knowledge services professionals.

Whether collaboration will replace hierarchy remains to be seen, but there is no question but that it is through collaboration, as Marshall teaches, that the best work is done. And collaboration is, by the way, the particular expertise of the knowledge services professional, providing yet one more reason for the knowledge services director and those employees identified as knowledge services professionals to take on the role of knowledge thought leader for the organization. For these knowledge specialists, collaboration is basic, part of the culture and background they bring to the management and delivery of knowledge services. For those who have come into the field via specialized librarianship and information management there is the added advantage that they bring with them service standards that are, generally speaking, above the norm for many employed in the service sector. They are very comfortable with using their relationship building skills and identifying "clever" software to sift through data in order to find patterns in stakeholders' behavior, for example. And they are well versed in the utility and value of social networking media in the knowledge services workplace. For them, and for those who work with them, collaboration is natural and their enthusiasm for the collaboration process seems to be unlimited, a point made by Cheryl M. Lamb, who writes that while "one cannot manage the tacit knowledge that resides in another person's mind" it is possible to manage the environment, a role which knowledge services professionals embrace. In their collaborative environment—which Lamb suggests is structured through navigation (including networking), validation, and facilitation—both knowledge professionals and their colleague-customers benefit from relationships that provide a "managed" environment.

For many, collaboration includes the breaking down of barriers and impediments and openly "challenging the processes" (as Kouzes and Posner stated the case in their directives for enterprise leadership), an approach that was suggested in several responses to a survey in 2008. Asked about the relationship between relevance of service delivery and effectiveness, on the one hand, and cooperation, collaboration, and other opportunities for working in tandem with non-knowledge services business units and people, one manager described how she looks beyond the immediate workplace (in her case, a specialized library in the corporate sector). She purposely seeks to identify important opportunities for the sharing of skills and techniques that are almost "built in" to the work of the specialized library or knowledge services functional unit: "I am concerned," this manager writes, "that libraries and information professionals are undervalued by the upcoming generation of knowledge 'needy.' They have been so hard wired to receive data as part of the infrastructure (computers! smartphones! IM!) that they are unable to determine what is important, to be knowledgeable, and to make good decisions from the information glut of daily life."

Continuing her comments about collaboration (which she characterizes as "marginalization avoidance"), this manager has her own prescription for moving forward into a knowledge culture for her organization.

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"Marginalization Avoidance"

Integrate
Live where the users live
Use what the users use
Leverage organizational
    tools for knowledge
    creation
Form partnership
Merge information and
    knowledge

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To keep from being marginalized, libraries must decentralize, integrate, live where users live, use what they use, and leverage organizational tools to help these people filter for knowledge creation. Of greater importance is relationship management, forming partnerships and becoming a part of the infrastructure to the extent that the information and knowledge staff become so established as to be indispensable, and to do this we must get on the social networking tools bandwagon. We have to get out of our comfort zone and come up with questions that are likely to be asked, before they are asked. Not only do we have to prove our financial worth, we must add value to our services. We can no longer rely on being the gate-keepers to unique sources of information because we are not playing that role any longer.

Yet even before the specialist librarians and other knowledge workers go to the people "on the floor," so to speak, they must establish a collaborative framework with the information technology specialists. Another survey respondent says that "first and foremost, collaboration with 'the engineers' is essential, and we must make efforts to bring these two supposed 'different' workgroups together. We must bring information services/information technology specialists and content managers/knowledge managers/specialist librarians to the table together."

In this manager's opinion, collaboration is critical:

> This is possibly the most critical of all the challenges we face today, not just working with the engineers, but to work at forging a *relationship* with the people in information technology. In my organization, the library is housed within IT. We, the librarians, need to have enough 'soft' tech skills so that we can effectively communicate our issues to IT, so that we can work together to solve problems and create products and solutions that work for our end users. We're all in the same business—we're here to help our end users—but we're not good at communicating with each other. Library-speak and IT-speak are very different languages (and I think it will be easier for us to learn IT-speak than it will be for them to learn library-speak!). There is just so much information out there about IT, about information technology, and it is not that difficult to learn enough to be respectable in a conversation. So I think we need to do it. It's a way to move collaboration forward.

Nevertheless, those cross-functional/cross-boundary collaborations are critical with groups other than information technology, and especially with functional units that provide parallel information-focused service delivery. For several managers, these are seen as perfect opportunities for KD/KS, as well as for that cross-boundary service delivery noted earlier. These situations provide good opportunities for not only enabling the knowledge services staff to keep up with news relating to

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those functions (whether immediately relevant to the work in the specialized library or not). By doing so, people working in the library can see what is happening and learn the language and culture of those functions and identify areas that might be relevant for the library. One suggestion is to investigate the organizational structure to determine if there are weekly or bi-weekly meetings to which library and knowledge services staff (or managers) might be invited, in order to share in the high-level view of what is going on in their worlds. Such opportunities provide additional opportunities for information exchange and one another's work and how efforts in one department might affect the work of the specialized library or information center. As the manager making this suggestion notes, though, "The library manager gets to share information about what is going on in the library and what might affect some of the other departments represented in these meetings."

BREADTH OF SCOPE

> **The Knowledge Services Business Unit**
>
> The function of the knowledge services business unit is to curate and manage the entire range of knowledge lifecycle, from knowledge creation to knowledge preservation.

The critical feature of the knowledge culture might be said to be its breadth. While it is possible and in many cases might be appropriate to engage in building and developing a knowledge culture for a subunit or section of an organization, the idea of the knowledge culture is almost by definition—and certainly as the present authors envision its impact and purpose—put forward in terms of the entire organization. Knowledge services professionals who focus on the role of the knowledge services business unit and the benefits it provides for the larger organization understand that directing the services, products, and consultations of the unit to the larger environment (and not on restricting them to individuals or individual departments) is essential to its success. The function of the business unit includes (or should in most cases include) curating and managing the entire range of the knowledge lifecycle, from knowledge creation, to capture, to knowledge sharing, as well as giving attention to the organization, management, reuse, and preservation of knowledge. To have maximum effect and to take advantage of the shared concepts and management philosophies—including tools and techniques—that support KD/KS, this curation function can ideally be applied to managing the knowledge assets of all departments and subunits of the larger enterprise, and as noted throughout these management action plans, the ultimate goal of the knowledge culture is an over-arching framework from which all organizational affiliates derive benefit.

This wide-ranging focus for knowledge services underpinning the knowledge culture can take on any of a variety of forms. Sometimes it relates to the service offerings of the designated knowledge services business unit, resulting in the knowledge nexus arrangement so often put forward for knowledge services. At Freddie Mac, Lois Ireland manages the organization's Corporate Information Resource Center. Ireland is a committed proponent of the idea of the knowledge hub. Working in a high-energy research environment (and a particularly demanding one in periods of economic difficulty), Ireland and her staff

see their role as knowledge advisors to the large number of employees who support Freddie Mac's work, both in the several offices in McLean, VA where the main headquarters operation is located and in regional offices located throughout the United States. Although not a government agency (the company is what is known as a GSE—a government sponsored enterprise—with a government charge, government regulators and such), this stockholder-owned corporation exists to support home financing for American citizens. Employees and management both recognize that Freddie Mac, so large and so diverse (there are some 5,000 employees) cannot succeed in its work unless there is a central information and knowledge services delivery function in place. At Freddie Mac, that function is provided through CIRC, the company's knowledge hub which has been designed to provide knowledge services delivery however it is required and to any member of CIRC's identified user base.

The definition of a knowledge hub may be a little different at Freddie Mac than at other places, as Ireland's team encompasses more than just the traditional information center. Nevertheless it fits into our picture of what organizations are doing to move to an enterprise-wide knowledge culture. In this case, the functions of the knowledge hub have in common a commitment to connection—connecting people to people or people to information resources, and a couple of examples can prove the point. One example, not surprisingly, is the ease of use of CIRC resources, since Freddie Mac employees can gain access to CIRC's resources from anywhere they happen to be as long as they have access to the Freddie Mac intranet. Another example has to do with the unit's wide-ranging ability to find the right resources inside and outside the company to respond to information queries, often through scanning for news stories, analyst reports, and other items of possible interest to CIRC customers. Another "connections" example has to do with partnering between CIRC and the records management staff for developing file structures and controlled vocabulary for business areas as they cooperatively utilize Freddie Mac's document management system.

"The technology allows employees separated geographically to participate in ways they haven't before," Ireland said in an interview, "and this enables them to feel more connected to what's going on at our main campus. It also allows people who attend a session or meeting, for one reason or another, to view it at their convenience, another way to share knowledge." Having these functions together under one umbrella positions Ireland and her team with a wealth of connections across the corporation. These knowledge services professionals know who to contact for internal information, and they have the required expertise and familiarity with outside resources.

Another perspective of the breadth of scope for the knowledge culture is an organizational ambiance or readiness for moving in a new direction that captures the overall (and identified) organizational

requirement for and enables its implementation. At a large U.S. federal government agency created to provide American support for the relief and advancement of developing nations, the overarching focus on the agency's single purpose brings forth a remarkable synergy of direction. In such an organization, such synergy also transfers into a recognized potential for cooperation and collaboration related to the internal workings of the agency and particularly with respect to the management and delivery of knowledge services. Indeed, at this agency employees are optimistic that the advancement of KD/KS strategy through an agency-wide knowledge culture seriously and positively impacts research management and as with Freddie Mac, a conscientious effort is in place to move from decentralization to a knowledge nexus approach for more effective research management. At the agency, knowledge services leaders have arranged to initiate a move to standardization and the implementation of common knowledge tools, and an early first step has been the adoption of a formal, agency-wide process for customer feedback, an effort made in response to an identified desire throughout the agency for a rapport and further collaboration among various knowledge services entities that function throughout the agency.

At the National Geographic Society, breadth of scope as a factor supporting the knowledge culture consists of five distinct elements, described by Susan Fifer Canby, Vice President for Library and Information Services at this famous scientific and publishing organization. The list makes clear that knowledge services elements combine to produce what is literally a knowledge culture at the Geographic. Fifer Canby's list—using active verbs—demonstrates the enterprise-wide management of knowledge services:

Element 1: *Identify* knowledge, which at the Geographic includes (but is not limited to) traditional sources of information, knowledge, and strategic learning content but expands to include knowledge content (such as conference materials and reports and research products) created in other divisions at the Geographic as well as content delivered by mobile communication devices and news through an index of RSS feeds

Element 2: *Manage* information, regardless of format, including catalogs for books, news, photos, film, journals, ephemera and databases for records and document management

Element 3: *Share* knowledge, which includes the management of the corporate intranet, the LIS website, published research guides, federated search capacity for digital and print information, and, emphasizing the enterprise-wide structure of LIS services, calendaring, mind-mapping, podcasting, briefings, and the like. Additionally, the LIS team at the Geographic has been using Web 2.0 media for more than five years, increasing significantly the unit's distribution footprint

Element 4: *Create* new content through such products as Business Intelligence Reports, Earth Current, Environment News, Special

Report, Trends Analysis, and databases such as Women Explorers, Timeline, and Future Events, all available across all departments of the Geographic and in many cases for the public as well.

Element 5: *Apply* knowledge to *influence*, as a basic philosophy driving the development of the knowledge culture at the National Geographic Society is the organizational commitment to cross-functional applications and knowledge sharing at all levels.

In an interview, Fifer Canby elaborated on the importance of this last element, describing in detail the influential role the knowledge services professionals and LIS, the knowledge services business unit at the Geographic, play at the Society. Early on in her career at the Geographic, she said, "it became clear to me that leadership and librarians must be inexorably linked if libraries are to serve their organizations effectively. Librarians need not only to be able to make the case for libraries but to influence organizations in the areas of information, knowledge sharing, and building culture." In her comments, Fifer Canby was specific about how this boundaryless approach to the delivery of information, knowledge, and strategic learning works:

> At the Society, we needed to develop other voices that could choose different venues where they could speak and be heard with different levels of staff, at the cafeteria table, in the hall, at a divisional liaison meeting, in a teaching moment, at the reference desk. So early on, I encouraged library staff to take on assignments (marketing, user training, weeding the collections, building out a women's wiki, liaison coordination, *etc.*) that would require them to work across divisions of the library, to learn what it takes to build a cohort, how to persuade people to spend their time doing what you want to see get done, how to run a meeting, and similar activities.

As time went on, this approach meant encouraging people not to wait for an assignment but, as Fifer Canby puts it, "to look for opportunity in the white space" and to work across the organization, to work with staff hierarchically above and below them and to learn to build teams. It meant getting everyone involved in leading and participating in teams, with the products of this influential element of knowledge services delivery ultimately resulting in a number of successful projects and programs, including taking a leading role in strategic learning for the Society through the development and management of the organization's professional development section, National Geographic Learning Systems.

TECHNOLOGY AND COMMUNICATIONS MATURITY

As the information age progresses into the knowledge age, we find ourselves giving much thought to workplace capabilities enabled by the technology and communications tools now available to us, and to their coming together and as they do so increasingly providing opportunity

for working in new and different ways, particularly with respect to the management of information, knowledge, and strategic learning content. As we seek to establish the KD/KS culture in the organizations where knowledge services professionals are employed, it is of course required that the knowledge services director and the knowledge services business unit's staff know about and make use of the tools that are available, not only to position the unit for providing the best possible service delivery but also—not so altruistically—to solidify the unit's relevance in the organization. But recognizing the value of the technology and communications tools we use every day does not mean that we have to know everything there is to know about the technology that supports them.

In the survey report referred to earlier, about future prospects for managing technology and research, a colleague noted that his concerns with being able to "do it all" are tempting him to work harder and harder and "drill down" into all aspects of the technology, but he resists the temptation: "It's not just things like Outlook rules," he said. "We are talking about blogs, wikis, social networking tools, as well as portals, KM software, federated search, RSS feeds, RFID. It's all out there, and we need to keep up, but we cannot become obsessed with things that might not necessarily help us."

This colleague then refers to one period in the history of the development of technology when it was accepted that "technology is best when it is appropriate, and even if the appropriate technology is a safety pin, then use it. But it takes exposure and analysis to find what is appropriate and there is no one 'answer' to the problem. It's a balance, and we have to keep up while still doing our work. We don't need to know the intricacies of every social networking system available out there, but we need to know what they can do and if and how we can use them in our organizations. And we also need to know when to discard things that don't work so that we don't waste time on them."
Related to that last comment, though, is one of another colleague who pointed out that caution is still appropriate: "We want to be careful about throwing out what's working just to replace it with something fashionable." In that statement might be a picture of part of the conflict that seems to concern so many managers, and which the previous participant seems to have captured so effectively: we need to balance.

Which is exactly what happened with the Cleveland Clinic, and as we examine the technology and communications maturity factor of the knowledge culture, it becomes clear that—after many false starts and dealing with many false hopes—at the Cleveland Clinic the time came to say "yes." As reported by Kathleen Kingsbury in June, 2008 this huge medical organization was in difficulty, and many of its problems could be pinned down to inadequate and outdated technological resources and major communications dysfunctions, particularly between the medical and technical staff. Opportunities for creating Web -based tools and media were not taken, and one leader in the

management of the EHR (electronic health record) function characterized the need as one requiring a "revolution" and a commitment to use technology to "transform the practice of medicine."

At the Cleveland Clinic, two avenues were used to manage the change to a knowledge culture, especially with respect to EHR and patient care, and to move the organization forward to a position where it would have at its service a mature technology and communications function. The first was to convince physicians that the effort would make their job easier and not harder, accomplished by demonstrating with concrete evidence how putting records in the physicians' hands immediately saves time, money, and energy and thus enables the physicians to do their work better. The second avenue was to convince patients that the capture of electronic information was to their advantage and did not imply that the physician or other health services professional was uninterested or uncaring about the patients' concerns. This latter change was accomplished through the simplest of adjustments, to have the computers on moving carts so physicians did not have to turn away from the patients when they are entering data. Indeed, the modified record input scheme proved so successful that it eventually led to the Cleveland Clinic's flagship EHR product, MyChart, an application that enables patients to access their own medical records and find up-to-date medical research.

> **The Information Technology/ Knowledge Services Connection**
>
> In the knowledge culture, knowledge thought leaders are confident in their own expertise and in their ability to collaborate as equals with information technologists.

So the conclusion for knowledge services directors, as for all managers, must be to recognize that technological and communications change is happening and happening fast. The solution, though, is not simply to look for opportunities and when they arrive, attempt to take advantage of them. Or worse yet, to look the other way. The knowledge services director and the knowledge thought leaders who make up the knowledge services team must also be confident in their own expertise, and in their own ability to collaborate as equals with IT leaders. And to ensure that the collaboration works, they must be willing to collaborate in the language of IT, as was noted earlier. If this means recognizing that the focus is on technology and becoming comfortable with the language of technology, by all means knowledge services professionals must seek to do so, to understand why the focus is there and move forward. Or, one colleague puts it, "Let's say yes!" (but only if "yes" is the right way to go).

MANAGEMENT ENTHUSIASM AND SUPPORT

The level of management enthusiasm and support for the knowledge transfer process is a determining factor in the success of the organizational knowledge culture. While connected with sponsorship (discussed later in this document and also described in detail in the concluding essay), senior management's perceptions about the knowledge services business unit and its recognition of the role of knowledge services in the organization's operational structure play a significant role in the determining how well the organization uses

knowledge, and how that use impacts mission-specific success. While one would expect a national library to have long ago embraced what we are referring to as the knowledge culture, Neil Infield reported in an interview that the British Library, the great institution where he is employed, was required to re-think at least some of its background as the new British Library Business & IP (Intellectual Property) Centre came into being. As it turned out, the success of the endeavor, which he manages, had much to do with the vision and commitment of the Library's Chief Executive, Lynne Brindley.

"When Lynne Brindley came to the British Library," Infield said, "her challenge was to build a library for the 21st century. Responding to that challenge was an openly stated goal, and she had to think about how society and the library would deal with such issues as digitization, customer focus, moving information delivery up the value chain, those kinds of issues."

Brindley clearly recognized that one of her early goals would be to match library services to the government's commitment to small and medium-sized enterprises (SMEs). If the UK government was encouraging entrepreneurship and innovation as essential to the country's future economic success, then service delivery from the British Library would have to match that commitment. As with any major research library, there already was some movement in that direction but much more was needed. As Brindley herself commented in an interview in *Harvard Business Review*, while the library was being used by researchers from large companies, SMEs were not taking advantage of the opportunities available to them. To even things out required "a major shift" in the mission and culture of the library, and it was all connected with Brindley's responsibility to oversee the development of the "new" British Library, moving toward a research institution that would be "more forward-looking and customer focused and much less exclusive."

It was a noble and ultimately successful ambition and notably, the development of the knowledge culture was not only supported by the enthusiasm and commitment of the parent organization's senior management. Infield himself, as the leader of the Business & IP Center, the specific knowledge services unit created to carry forward the forward-looking and customer focused direction, chose to employ this knowledge culture factor in the Business Centre itself.

"This is not to say it was easy," Infield said. "It's hard to make people switch, to ask them to do something different. It makes them very nervous, very uncomfortable. But information professionals know how to find the information, better, quicker than the user, and in the Business Centre it's the role of these people to be the information experts, and we had to help them realize that they are experts."
One of Infield's first steps was to ensure that his librarians knew he was aware of how difficult the situation was, that he understood—as they would have to understand—that change involves taking risks.

"I just said to them, 'Look. That's what change is all about. We will all make mistakes, but you will not be punished if you make mistakes.' But it takes a lot of effort to change staff, to get them to give attention to taking risks, to making the library easier and simpler to use, to listen to customer feedback, hold workshops, and go forward with that customer -focused framework."

Another of his approaches was what Infield calls his "information and advice" role, not just for staff but including himself: if he was going to ask his librarians to take on a new entrepreneurial role for librarians, to be business advisors to the customers who come to the Business Centre, he was obviously going to participate himself but that step, for Infield was not a difficult decision.

"This is something I like to do anyway," he said in the interview. "In my prior jobs I had worked with the information customers and I certainly don't mind doing it now. The only problem is the time issue. As a manager I don't always have the luxury of taking my turn at the enquiry desk, but it is something I want to do, and when I'm not able to do it, that is an exception rather than the rule."

Understanding the importance of senior management's enthusiasm and support is obviously key to success in any knowledge culture and when the knowledge services director and other management staff can replicate that factor, everyone connected with the effort, from the highest officials in enterprise leadership to the identified customers, stand to benefit.

VALUE CREATION

The Value of Intellectual Capital

That knowledge is an essential and critical organizational asset and that the KD/KS process is a legitimate functional operation are the philosophical underpinnings of the knowledge culture.

Recognizing and conveying the value of intellectual capital in the achievement of the organizational mission—that knowledge is an essential and critical organizational asset and that the KD/KS process is a legitimate functional operation in the organization—are not open to question for most knowledge workers. Yet because KD/KS are ubiquitous (whether acknowledged or not) to the pursuit of success, this factor of the knowledge culture must be given specific attention as enterprise leadership begins to embrace the concept of the knowledge culture. Providing the means for that attention would seem to be a fairly straightforward process, but there often seems to be a somewhat negative attitude about how knowledge services, as an operational function, can be valued. One colleague noted with sadness when asked to express his views on the subject that it had been his experience that "when the accountants are looking for cost savings these departments are at the top of the list."

Is there an answer? For some, it would be, as this manager puts it, to "find a 'magic bullet' which can demonstrate in accountant friendly terms just what value knowledge services professionals bring to the organization." Other knowledge services directors have their own

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techniques and approaches, but like other managers in the organization, they are often surprised at how little financial value is put on the services they and their colleague provide.

There does seem to be one source of stimulation, according to another knowledge services director. This person writes, "The biggest challenge that I see here (and elsewhere) is that we are being asked to do more with less. The smart organizations (and I would like to think that there is still an abundance of those!) will not close their libraries and information centers, but they will ask the directors to manage with a smaller staff and increased responsibilities." In this case, the knowledge services director has responsibility for the organization's specialized library, as well as organizational archives, the company's digitization project and, since the organization includes a wide membership base, an information resource and clearinghouse for the industry. For this director, "The solutions to this challenge will be (and are currently) multi-level: we re-think our priorities and we question whether all of yesterday's services/tasks, *etc*. are relevant and necessary today. When required, job descriptions are modified and if the tasks are more than can be accommodated in the hours in the day, we look to what can be outsourced. These are the challenges relating to service delivery that we must confront, and on a daily basis."

For other knowledge services directors, the value of services offered and delivered (whether called library services or something else) must, be matched to the organization's success in accomplishing its strategic mission. This means, in the words of one colleague, moving "away from" defending the library or library-like function as a place or function ("as we find ourselves doing too often") and concentrating on the professional skills and values our information professionals bring to the organization."

> ## Metrics…
> ## Metrics…
> ## Metrics
>
> Establishing value for the KD/KS process means that knowledge workers must think of themselves as business people, as men and women working in business. They must deliver measurement results in business terms.

Another solution to the "value" challenge urges knowledge workers and the directors of knowledge services business units to think of themselves as businessmen and businesswomen: "Metrics, metrics, metrics," a colleague pointed out in a meeting. "Measure, measure, measure. And deliver measurement results in business terms. There is only one question management wants answered: Do the services provided by the knowledge services functional unit save the organization money? It's that simple. From the organizational management perspective, it's all about metrics and ROI. In our field we tend to roll our eyes when we hear about ROI but this is what management wants. It is very important to capture metrics, and they must be specific, actionable metrics."

The delivery of value—and demonstrating value—has been taken up by Sheldon Ross at Swiss Re, the international company that provides reinsurance products and financial services for enabling the risk taking considered essential to enterprise and progress. Priding itself on its state-of-the-art corporate governance and the related transparency, Swiss Re's long history of sharing knowledge and expertise with clients and

other stakeholders explains why knowledge services is not a particularly new or novel component of the corporate picture. At Swiss Re the corporate knowledge culture is already in place and it is the responsibility of Ross, as Americas Head of Group Knowledge and Records Management, to ensure that the company is positioned to proactively manage and use knowledge to create a competitive advantage.

Like all industries, reinsurance has its own terminology and its own culture and at Swiss Re knowledge value relates to risk management, with enterprise risk management (ERM) expected to perform as an essential tool for the company. ERM frames the work in the reinsurance industry, just as enterprise content management (ECM) frames the work that knowledge services managers bring to their organizations. For Ross, it is the happy marriage of ECM and ERM concepts that enable high standards of service delivery at Swiss Re and which enable him to demonstrate value to the company.

"ERM is a vital concept in our day-to-day operation," Ross described in an interview, "and we strive to manage and deliver knowledge and information in a manner that effectively reduces the risk that our professionals make decisions without correct or actionable information or knowledge."

Ross notes that the delivery of knowledge services includes the application of traditional library skills and expertise to corporate reputational and operational initiatives like sourcing, records retention, email retrieval, information distribution and the global dissemination of best practices. As part of this picture, the management of knowledge is understood and practiced in a wide variety of ways.

"Knowledge is a critical corporate asset," Ross said, "and that means we must manage the development of new processes and tools, set standards and produce guidelines that will not only support Swiss Re's existing and future business but also guarantee a return on Swiss Re's investment in supporting a corporate knowledge culture. Additionally, we're required to demonstrate where the value lies, which we do when we focus on topics such as the risk of copyright infringement, records retention, content sourcing or compliance with Sarbanes-Oxley. Most management teams are concerned about these kinds of ERM/ECM issues. Today, you must be able to speak management's language and explain the operational and reputational risk aspects of what you do. You can easily put a figure and metrics on what the company would lose if attention is not paid."

That reference to Sarbanes-Oxley is not just idle conversation. Throughout corporate America, the Sarbanes-Oxley Act of 2002 (often referred to as "SOX" or "SarbOx") has changed the way companies do business. Requiring that public companies evaluate and disclose "the effectiveness of their internal controls as they relate to financial reporting," as one description puts it, this wide-ranging legislation

Value Creation

Value creation matches KD/KS with an already established strategic thrust in the organization. Knowledge is recognized as critical because it supports a successfully managed strategy.

means that corporate compliance in financial oversight is not a matter of choice. For Ross and the knowledge services professionals who work with him, this new focus positions records management, information sourcing, and information management as top corporate risks for which they are responsible. Luckily, with a KD/KS process already in place, such compliance efforts seem more reasonable, a situation used to his operation's benefit. So the story here then becomes one of value creation by connecting with a strategic thrust in the organization. At Swiss Re, knowledge is recognized as critical because it supports the successful ERM process, an already established strategic driver in the company, a point Ross makes.

"In this environment," he said, "we naturally give a certain amount of attention to establishing the value of what we do by ensuring that our work is recognized as being part of the larger corporate enterprise risk management picture."

Not surprisingly, establishing value for the KD/KS process requires some tweaking from time to time, but Ross is comfortable talking about how he does it. "For us to be successful," he said, "we need to be clear on where we add value to Swiss Re and be able to articulate it in a manner that management and staff can understand. Others in the organization must understand where we add value. Yes, knowledge is very much a tradition at Swiss Re, and yes, the value of knowledge is well established, but sometimes it requires a certain type of communication to help management understand the work of the knowledge services staff. We help them along by speaking their language."

Speaking the language, identifying what has to be done, recognizing the influential value of enterprise leadership, providing a management structure for KD/KS, understanding that people want to collaborate—it all comes together as the enterprise-wide knowledge culture moves toward its development. When that time comes, the role of the knowledge services director and the staff of knowledge services professionals he or she leads (as well as interested and committed knowledge champions, advocates, and sponsors from outside the knowledge services "realm") are ready to go forward with building and sustaining the knowledge culture. They understand their mission, and now they go forward to do their work.

OUR STRATEGY FOR AN ENTERPRISE-WIDE KNOWLEDGE CULTURE

Leadership is about vision, about having an idea of what you want to achieve. For the knowledge services director, for the organization's knowledge thought leaders (who include, of course, the knowledge services director as well as others in the organization who envision working in a knowledge-focused future), and for senior managers who are responsible for providing enterprise-wide leadership, building and

then sustaining a knowledge culture is based on vision. It all begins with thinking about just how good knowledge services can be, just how successful the knowledge culture could be in supporting the organization as it achieves the organization mission. Obviously these judgments can be determined only after the fact. But to move toward that success requires having a strong vision, a direction to pursue, and a sense of purpose that moving in that direction is best for the organization and its affiliates and stakeholders.

It is the vision of the knowledge culture that provides organizational knowledge thought leaders with answers to the questions of strategy. Management wants to know, and rightly so, what the central value proposition is for building and, once built, for sustaining an enterprise-wide knowledge culture? What are the objectives? What will be achieved? How do the knowledge services director and those in agreement about the place of a knowledge culture begin their work? Who will be the players? These are the questions that confront knowledge services directors as they seek to work with enterprise leaders, to establish KD/KS as an accepted philosophy for the workplace. To answer them, we recommend five steps, and we begin with the subject discussed more than any other.

ESTABLISH THE VALUE PROPOSITION

The Knowledge Services Value Proposition

The value proposition in knowledge services seeks to articulate the benefits stakeholders receive through their relationship with the management and delivery of knowledge services.

When we speak about the value proposition in knowledge services, and particularly as we seek to assign a value proposition to building and sustaining a knowledge culture, we have a definite goal in mind. We are attempting to articulate the benefits stakeholders and others affiliated with the enterprise receive as a result of their relationship with the organizational management and the delivery of knowledge services. While most people in almost every environment can find what they require and "get by," so to speak, the application of information, knowledge, and strategic learning content can be costly to the organization if results are merely "good enough" on a continuing basis. Assigning a value proposition to knowledge services and to the development of the knowledge culture is an expression of added value, enabling knowledge workers to recognize that the quality of service delivery in knowledge-seeking activities is an added benefit of their membership in the community (regardless of whether that community is defined as the larger organization or an individual group within it).

To determine the value proposition for the development of a knowledge culture, begin the process by identifying strategic opportunities for demonstrating how the knowledge culture can ensure higher-level research, knowledge development and knowledge sharing, and final implementation as the results of the knowledge search provide benefits that would not have been available otherwise. Support this activity by identifying the bottom-line impact of the knowledge culture: what outsourcing can be avoided? what costly project staff can be reduced? what reductions in travel, meeting arrangements, and other related

expenses charged to the knowledge delivery process will be eliminated? The next step is to focus on projects that will achieve notice, to establish that activity undertaken as part of knowledge services management, especially activity with a short-term payoff, can be cited to refer to the success of a well-managed KD/KS process for the organization. Related to this, of course, is the use of meaningful measures of progress and demonstrated results, and it is here that probably the most important phrase in the whole knowledge culture building process is used: **Make it relevant**. Whatever savings are being demonstrated or products proven to be worthwhile, they must relate *exactly* to the successful achievement of the parent organization's mission. If that direct connection can be made, the validity of the change is proven and the knowledge services director and staff are in a position to demonstrate that the proposed recommendations are viable. In making the point, the value proposition is strengthened as discussions and demonstrations about future opportunities are carried out in terms of how, in the knowledge culture, they will impact performance and organizational effectiveness.

At one large multinational organization, the development of the value proposition for moving to a knowledge culture was achieved through specific strategic objectives:

1. Build a leadership team for managing the program

2. Establish an organization-wide KD/KS culture*

3. Build a knowledge-centric strategic learning framework for the agency (in cooperation with HR and whatever other functional departments are involved in strategic learning, professional development, and training)

4. Deliver knowledge services through a program the combines the values of the digital format with the strengths of collaboration and cooperation

5. Manage the knowledge services business unit with an on-going emphasis on opportunity-focused and results-focused efforts.

IDENTIFY PARTNERS AND SPONSORS

As is made clear in practically every discussion related to knowledge services, the work of developing and then sustaining the knowledge culture cannot be done by any one person or group of people, no matter how well-respected and how successful they are in the management and delivery of knowledge services. For the knowledge culture to come into being, the organization's knowledge thought leaders (and others to be

* Taking into account that such a process—especially in the international community—requires serious consideration of other cultures and environments and how workplace performance in the larger organization is influenced by these. Of particular importance is the question of how knowledge services competes with or collaborates with these cultural and environmental influences in the process of building and sustaining the knowledge culture. What level of collaboration and cooperation, for example, is required to ensure that these are integrated into the knowledge culture?

recruited to be knowledge thought leaders) must turn their attention to identifying partners and sponsors who will work with them. These will include a variety of people located at various levels throughout the organization, but three come immediately to mind: the knowledge services workers themselves and like-minded colleagues (who may or may not have "professional" qualifications in knowledge services management), people in other departments who are recognized for innovative leadership, and sponsors recruited from senior management. Knowledge services professionals are, as has been described, the logical and natural knowledge thought leaders for the organization. While some of these employees may have an initial reticence about taking on a responsibility of such great consequence, as they learn of the opportunities for success and the importance of the work to in advancing the place of the knowledge services business unit in the larger organization, they will want to be part of it, and a characterization and reputation as a "knowledge thought leader" can go far in attracting these employees to this work.

As networkers, these knowledge services professionals already have contacts with other knowledge workers in the company. Through their networking (and through the service sphere of the knowledge services business unit itself, through which they have come to know others in the organization), these knowledge services professionals will have identified people in other departments already recognized for their innovative leadership. They are thus in a good position to bring these other knowledge workers and colleagues into the picture as knowledge thought leaders, and while some of these people may not be necessarily active with respect to knowledge development and knowledge sharing, or think of themselves as such, as leaders in their business units and departments, they participate at some level in KD/KS. As noted earlier, knowledge services professionals are not the only qualified people to serve as knowledge thought leaders for the larger enterprise, and as the organization moves in the direction of a knowledge culture, the activity provides a very good effort for the networking to continue, moving to an advantageous result for all affiliates.

Sponsors, too, are important candidates to engage as knowledge thought leaders, although their role may be as valuable for their influence as for their actual participation. Nevertheless, there is one area in which their involvement is imperative. That is in change management and change implementation, and while the specifics of change management and an operational framework for change implementation are described in detail in the following essay, we can, in connection with the role of sponsors, share a few specific guidelines with respect to the knowledge culture.

The first of these simply recognizes that any move toward a knowledge culture requires attention to change management and that change cannot be managed without the enthusiastic and wholehearted commitment of sponsors to the change. Sponsors—unlike advocates and champions—are the bedrock of successful change in any organization, and in

moving toward a knowledge culture, with the enormous requirement for changed thinking and behavior that is required, sponsors must be identified and established in the development process. Sponsors are required, as we note, not only to commit to the change, but to express, model, and reinforce their commitment. They do this by serving if not as change agents themselves as advocates for the changes that must be made and as identified supporters of the knowledge thought leaders who move out in front to show the way. As sponsors, they bring into place the synergy of advocacy and support and they themselves become a powerful driving force for change.

Not surprisingly, the effectiveness of sponsors in change management is greatest when there is a critical mass of involved participants, as W. Chan Kim and Renée Mauborgne describe. "In any organization," they write, "fundamental change can occur quickly when the beliefs and energy of a critical mass of people create an 'epidemic' movement toward an idea." The example they use, the technique of which they refer to as "tipping point leadership" comes from William Bratton's success in bringing about massive change in the New York Police Department. Bratton employed four change management tools: he put managers face-to-face with operational problems, he identified change implementation opportunities in areas that would result in the biggest payoffs and high-visibility, he identified and exploited key influencers who (as Kim and Mauborgne describe) have "disproportionate power because of their connections or persuasive abilities," and he was consistent and would not allow his change effort to be lured "off message." These can be translated into the knowledge services workplace and successfully implemented as the development of the knowledge culture is pursued.

CONDUCT AN OPPORTUNITY ASSESSMENT

Moving toward an enterprise-wide knowledge culture includes a thorough assessment of the organization's culture in order to determine the overall maturity level. It is extremely important to have an understanding or even an inventory of existing services, projects, technologies, and skill sets against which the proposals for the knowledge culture can be matched. At the same time, and equally important, an "ambiance" or culture assessment is in line, since a basic decision must be made early on whether the organization is one that would benefit from a knowledge culture, or even if there is interest about the possible advantages of an enterprise-wide knowledge culture. If the organization is one in which the *status quo ante* is the norm, there is little reason to pursue the effort (but, truth to tell, with strong examples laid out in the value proposition for the knowledge culture, there are hardly any organizations that would not benefit from a more knowledge focused environment).

One methodology for conducting an opportunity assessment is to identify the basic elements of organizational management (or, as one

entrepreneur puts it, "what keeps management up at night") and take a good hard look at how well these management elements are performing in the organization under discussion. A useful beginning might include a determination of the relevance of each of the following and an evaluation of their effect on the KD/KS process in the organization:

1. The knowledge management/knowledge services background in the larger organization. What does a snapshot of KM/knowledge services reveal?

2. The knowledge services audit. When was the organization's intellectual infrastructure last inventoried? How has the knowledge services environment changed since then?

3. Knowledge strategy. Is there a knowledge strategy for the larger organization? For the knowledge services business unit? For other information- knowledge- and strategic learning-focused business units? Are there strategic maps that demonstrate how to move from where knowledge services is today to where it should be tomorrow?

4. Strategic learning. How is strategic learning managed in the larger organization? How does attention to strategic learning affect organizational effectiveness?

5. Business, professional, and service delivery ethics. How is attention given to these subjects in the larger organization and what is the role of the knowledge services business unit is assuring that information, knowledge, and strategic learning content on these subjects is available and delivered to organizational affiliates

6. Collaboration and cooperation. What hierarchical and collaborative management techniques determine the value of resource sharing? In the larger organization, what is the general feeling about KD/KS? Is sharing something people are comfortable with?

7. Business development, customer services, and CRM. How are knowledge services users/customers identified? What specific, measurable tools and milestones are adapted and implemented for establishing and/or increasing the recognized user base?

8. Measurement and metrics. What tools are used for measuring knowledge services success? Are benchmarking, added value, discussion tracking, customer satisfaction surveys, and the growth of intangible assets used to measure operational success?

9. Risk management. What is the connection between the knowledge services business unit and organizational risk management?

10. Enterprise Content Management (ECM). What opportunities exist for the knowledge services business unit to develop and manage enterprise-wide content dispersed throughout the organization, particularly in terms of identifying solutions for dealing with both structured and unstructured content that cannot be found through the services of any recognized or "usual" department or functional unit?

11. The relationship between technology and knowledge/systems. Recognizing that technology is the tool that enables knowledge services and the knowledge culture, what is the critical enterprise-wide framework for assessing the role of technology? Does the organization focus on application services, smart tools, organizational data management, and similar solutions while at the same time identifying issues that relate to the management of intellectual capital from the non-technical and interpersonal perspective?

12. Project management. How are projects managed in the larger organization? Are there opportunities for incorporating KD/KS into the project management function? Is attention given to KD/KS in the overall process, including goal definition, planning the work required to achieve the goal, oversight of the total project and support teams, monitoring and measurement, and, as required, bringing the project to closure when completed or truncated?

13. Personal knowledge management (PKM). What techniques and tools are available for identifying knowledge services processes that colleagues can utilize for enhancing their own role in enterprise success? What is available for transitioning this into opportunities for others in the larger organization?

14. Knowledge services director. What are the responsibilities of the organization's primary knowledge thought leader and corporate spokesperson with respect to knowledge services. Is there a description of organizational duties and expectations for knowledge services leadership with respect to management, organizational strategic learning, and service delivery?

BUILD THE BUSINESS CASE

For best results, and to permit the articulation and capture of primary requirements for building and, when built, for sustaining the enterprise-wide knowledge culture, the business case begins with a statement of need and the development of a knowledge "charter" describing the vision and mission for the effort. This document should include the following:

■ Position statement (defining of the knowledge culture for the particular institution, organization, or enterprise) and its expected contributions to the achievement of the organizational mission

■ Planning assumptions

■ Organizational vision, mission, and values statements

■ Short-term and (if appropriate) long-term goals

Once the charter or statement of purpose has been prepared, the knowledge services director and other members of the knowledge culture-building "team" will move on to developing a framework for implementing the process:

- Identify necessary business objectives and prepare a statement describing how business objectives are reached in an organization that is built as and functions as a knowledge culture. Match these more general objectives to the specifics of the present organization.

- Identify specific projects/initiatives, including a priority order, and provide justification for same

- Plan for technology implementations that support these initiatives

- Describe the roles of knowledge thought leaders, knowledge services professionals, other affiliated participants, and sponsors

- Prepare review and monitoring metrics, and include in the design of these instruments a measurement system for monitoring not only ongoing performance but a flexible structure that will permit "mid-stream" corrections

- Prepare a change management plan

- Prepare a communications plan for both internal and external targets, with a commitment to transparency and knowledge sharing.

PURSUE THE IDEAL

Knowledge Services: Putting KM to Work

"The *Practical* Side of KM"

Leveraging knowledge

Creating value

Improving the efficiency and effectiveness of individual and collaborative knowledge work

Increasing innovation

Sharpening decision-making

As the development of a strategy for the knowledge culture begins to come to fruition and as early successes are recorded and communicated, the knowledge-*centric* organization envisioned by the knowledge services director begins to take shape. There are signs that the organization is moving toward an environment or ambiance in which the organization itself is recognized for its knowledge focus, and at this point, some consideration of the transition from what is generally being referred to as knowledge management to knowledge services is in order. For example, a framework for knowledge services is established beginning with Mark Clare and Arthur Detore's definition of KM as "a set of management activities designed to leverage the knowledge the organization holds in order to create value for employees, customers, and shareholders/stakeholders."

Acknowledging that it is in the practical and actionable tasks described in the definition ("leverage," "create value," *etc.*) that we see KM transition into knowledge services, the practical side of KM and used to "put KM to work." These activities then become services, products, and consultations for supporting the larger mission of the company or organization and when this takes place, the organization is positioned for strengthened contextual decision-making, accelerated innovation, higher-level research, and excellence in knowledge asset management, the very foundation of organizational effectiveness.

The transition resonates particularly with another KM definition, that of the Special Library Association Knowledge Management Division's definition, published in a paper by Karen Reczek, the division's founder. Describing how specialized librarianship is integrating into

KM (and vice versa), Reczek poses the intriguing question of whether the two disciplines are combining into a new profession:

> ...knowledge management refers to strategies and structures for maximizing the return on intellectual and information resources. Because intellectual capital resides both in tacit form (human education, experience, and expertise) and explicit form (documents and data), KM depends on both the cultural and technological process of creation, collection, sharing, recombination, and reuse. The goal is to create new value by improving the efficiency and effectiveness of individual and collaborative knowledge work while increasing innovation and sharpening decision-making.

Again, by giving attention to the actionable items in the definition, we see a natural situation for what can be put forward as a convergence, converging KM with information management and strategic learning into knowledge services. As with Clare and Detore, the action terms included in Reczek's phraseology (creating new value, improving efficiency, improving effectiveness, collaboration in knowledge work, increased innovation, sharpened decision-making) all combine to move the theoretical of KM to the practical of knowledge services.

All of which brings us to our concluding vision for the knowledge services director, an ideal but achievable effect of knowledge services and its role in building and sustaining the knowledge culture. Suggested by knowledge strategy specialist Linda Stoddart and shared in a conversation between Stoddart and the authors, could not the following be a likely depiction of the knowledge services director of the future (who today might be the lead information specialist in a company, the manager of a specialized library, the head of a corporate IT department, the leader of a user experience management team, or any of the myriad other professional managers with management and service delivery responsibility for information, knowledge, and strategic learning)?

> In an organization built on a knowledge culture, the knowledge services director reports directly to the CEO and has management responsibility for the company's internal knowledge-sharing and innovation practice. This senior-level management employee has the title Director, Knowledge Strategy, and the knowledge-sharing and innovation practice is part of the organization's strategy development division. In including knowledge strategy in the organizational structure (alluding to the accepted description of knowledge strategy as organizational business strategy that incorporates attention to intellectual resources and capabilities), enterprise leadership emphasizes the critical connection between organizational business strategy and organizational knowledge strategy.

DEVELOPING YOUR STRATEGY:
DISCUSSION QUESTIONS

In the SMR International Management Action Plans—and especially in this SMR MAP—we refer often to the knowledge services director and the information professionals in the knowledge services business unit as *knowledge thought leaders* for the larger organization. The purpose of these discussion questions is to give you a "thought-outline" in which you and your colleagues can capture and codify the required planning elements for your knowledge services strategic framework.

It is our premise that organizational effectiveness is achieved through an enterprise-wide knowledge culture based on excellence in the management and delivery of knowledge services, the convergence of information management, knowledge management, and strategic learning in support of the larger organization mission. Knowledge services represents the *practical* side of knowledge management , evolving through knowledge development and knowledge sharing (KD/KS), with the critical result being the development and on-going implementation of a knowledge culture, enabling the successful achievement of the organizational mission.

At this point, you have made a decision to explore further the concepts associated with the knowledge culture. These questions will help you as you take up your decisions and, if you choose to do so, as you begin to make plans about how you might develop and implement a strategy for incorporating your work into the larger organizational business strategy, seeking to match the corporate knowledge strategy with the corporate business strategy.

Your first step will be to begin discussions with selected colleagues about the concept of a knowledge culture and the appropriateness of a knowledge culture for the organization in which you are employed. Then, once you have used these discussion questions to organize your ideas, you and your colleagues can proceed to the next section of this SMR MAP and use the Action Plan format published there to structure your plan.

Establish Your Objective. Having read through and become familiar with the concepts described in the essay, "Building the Knowledge Culture: The Knowledge Services Effect," connect your ideas about knowledge services within the larger organization by thinking about the following questions. Ask your colleagues to do the same. Then discuss your responses with your colleagues.

1. Provide a description of your background and interest in the management and delivery of knowledge services for the larger organization. Does this interest in knowledge services connect to your work? If so, how? In other words, is the management and delivery of knowledge services part of your job or that of your colleagues? If not, where does knowledge services fit in the organizational structure? Should someone representing that section or division be part of your discussion group?

2. What is the organizational environment with respect to information management, knowledge management, and strategic learning? Has the organization conducted an environmental scan focused on knowledge use, KM, and knowledge services in the organization? Are the findings of the environmental scan available for you and your planning team's consideration?

3. Identify the *central value proposition* for preparing a strategy for building and, when built for sustaining a knowledge culture in your organization. How would you complete this sentence:

   Preparing a strategy for restructuring the larger organization as a knowledge culture will

4. What are the drivers for considering such a major change in the organizational culture?

    ❑   Interest and direction from senior management

    ❑   Awareness of strengthened KD/KS in external organizations and industry competition and desire to move that strength into this organization

    ❑   Concern about the current state of knowledge services delivery within the organization

    ❑   Concern about the lack of knowledge and misunderstandings about the value of knowledge in organizational success

    ❑   Conversations with internal colleagues and knowledge workers

    ❑   Conversations with professional colleagues and current awareness of industry practices (e.g., through professional readings, professional learning activities, conference attendance, etc.).

    ❑   Benchmarking studies

    ❑   Knowledge services audit or needs assessment

    ❑   Other (describe):

5. What is the intended scope of the proposed strategy? Are you thinking about developing a knowledge culture for the entire organization, for a single individual functional unit (such as the unit or department with current knowledge services management and delivery responsibility), or for a group of parallel business units that focus on information management, knowledge management, and/or strategic learning?

6.   How would the development of a strategy for building a knowledge culture be perceived in the context of other management and service delivery applications in the larger enterprise? [Note: fit your project thinking into this existing structure and test your language and logic with experienced colleagues and project owners.]

    Concepts for you to consider might include:

    ❑   How are these other applications perceived?

    ❑   What is their scope?

    ❑   Is there potential for synergies and combining resources with other functional units, especially units with parallel or similar functions?

    ❑   Are there lessons to be learned from past implementations?

    ❑   At the same time, are there innovation leaders known to your planning team who can bring fresh "out-of-the-box" thinking to the strategy planning process? Can you interest them in hearing your plans and sharing their experiences with similar projects in other parts of the organization?

7. How would you describe the organization's readiness for change? How has the organization responded to change management and change implementation in the past? Were these perceived as positive or negative experiences?

8. Can you describe the organizational culture with respect to knowledge services?

    Concepts for you to consider might include:

    ❑   The current KD/KS culture in the larger organization, current knowledge-sharing activities, incentives/disincentives for KD/KS, and some history of KD/KS in the enterprise.

    ❑   Leadership's expressed desire for improved KD/KS and any tangible modeling or reinforcement of same. Can strong political ownership for a knowledge culture (or at least for planning strategy for a knowledge culture) be developed?

    ❑   Is there a serious business problem that can be articulated and addressed by your proposed strategy to build a knowledge culture?

9. Who are (or would be) the key players in the effort to plan and develop strategy? Is the interest in such an effort enterprise-wide and cross-functional? If so, who has the authority to enable its success?

10. Related to these considerations, who are the key players in determining organizational success? Is there an organizational development functional unit or an organizational effectiveness department in place? Are these people (managers and employees) aware of the role of knowledge services in enterprise success? Would it make any difference to them if the organizational management structure was reorganized to function as a knowledge culture?

11. Describe your experience in early discussions with colleagues and other knowledge workers about the concept of a knowledge culture, both within the workplace and in external discussions. Is developing a strategy building a knowledge culture feasible for the organization?

12. Can you find or devise a plan for monitoring, controlling, and ultimately closing your strategy development project? Considerations about the lifecycle of strategy development should be anticipated and included here.

Developing Your Strategy. Your next step is to spend time with your colleagues reviewing the framework of factors that enable success in building and sustaining the knowledge culture, leading to the development of a business case for your knowledge building strategy.

13. Is there an identified knowledge thought leader in the organization at the present time?

    ❑   Yes
    ❑   No
    ❑   Not sure

14. If there is not such an identified knowledge thought leader, is there a candidate or employee (knowledge services director) for whom this is an appropriate designation?

    ❑   Yes
    ❑   No
    ❑   Not sure

15. Is there a group of people who can take responsibility for knowledge leadership—as defined in the preceding essay—and work as a team to develop a strategy for building the knowledge culture?

    ❑   Yes
    ❑   No
    ❑   Not sure

16. Describe the collaborative environment in the larger enterprise. Is collaboration basic and part of the organizational culture or are collaborative situations considered "too much trouble" and thought of as interrupting the "real work" of the employees?

17. Breadth of scope as a factor in developing a knowledge culture has already been considered (Question # 5). Are there other considerations that in your organization should be considered (for example, bringing in external advisors and partners if the company's service sphere extends beyond internal staff and customers)?

18. What is the relationship between employees with management and delivery responsibility for knowledge services and leaders with authority to approve and support the restructuring of the organization as a knowledge culture?

19. Are there identified advocates and champions who would respond to opportunities to work with the strategy development group as it moves forward?

    ❑ Yes
    ❑ No
    ❑ Not sure

20. Is there a formal sponsor, a member of enterprise leadership who positions himself or herself to express, model, and reinforce the value of developing a strategy for restructuring the organization as a knowledge culture?

    ❑ Yes
    ❑ No
    ❑ Not sure

21. If not, can you identify such a person (or persons) and establish a procedure for a sponsorship role?

    ❑ Yes
    ❑ No
    ❑ Not sure

22. How is the value of intellectual capital understood and conveyed in the larger organization? Is the "match" between intellectual capital and the successful achievement of the organizational mission clear to employees?

23. As planning for a knowledge culture strategy begins to progress, identify a particular strategic theme or thrust to which knowledge services support is attached. Can this connection be used to validate the strength and value of intellectual capital in the organization?

24. As you seek to establish the value proposition for the development of a knowledge culture, give attention to identifying strategic opportunities that can bring about better knowledge services management and delivery.

25. The success of strategic learning—one of the three elements of knowledge services—in the larger enterprise can be a powerful driver in establishing a knowledge culture. What is the state-of– th-art of strategic learning at the company?

26. Would you and the other members of the strategy planning team characterize the knowledge development and knowledge sharing (KD/KS) process as *opportunity-focused* and *results-focused*? Talk among yourselves about how these descriptors match—or do not match—the intellectual capital environment in the larger enterprise.

27. Review the list of "basic management elements" described in the preceding essay (pages 41-42). What is the condition of each of these in the larger organization and how do you expect that condition to affect the development of a strategy for building and sustaining a knowledge culture?

28. With your planning group, build the business case by developing your knowledge "charter" or statement of purpose, as described. You will be required to:

- ❑ identify necessary business objective
- ❑ state how these business objectives will be achieved in an organization that is a knowledge culture
- ❑ identify specific projects and initiatives, prioritized
- ❑ determine and plan technology requirements
- ❑ establish the duties and responsibilities of knowledge thought leaders, knowledge services professionals, other affiliated persons, and sponsors
- ❑ prepare review and monitoring metrics, milestones, and flexible evaluation tools and techniques
- ❑ prepare a communications plan
- ❑ prepare a change management plan

29. Describe how, in your opinion and that of your colleagues, the transition of knowledge management *from* knowledge management to knowledge services occurs, and how that transition affects the development of strategy for building a knowledge culture for the organization.

30. Describe an ideal but achievable effect of knowledge services. What would you envision as an organizational framework that is structured as a knowledge culture?

Now proceed to develop the action plan for your specific measurement activity. Using the following two -page format, work with your team to capture the elements required for developing strategy for building the knowledge culture for your organization. As required, use copies of the format for each step of your planning effort and then pull the entire framework together.

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ACTION PLAN

Overall Desired Effect (Specific, Measurable, Achievable, Relevant, Time bound)	To:_____(Action Word) What: _____(Desired Effect) By: _____ (Date) So that: _____ (Result or Impact)
Actions (Work Breakdown Structure)	Action_____Who_____When _____ Action Action Action Action_____Who_____When _____ Action Action Action Action_____Who_____When _____ Action Action Action Action_____Who_____When _____ Action Action Action

Assets	Sponsor:
	Assigned (or potentially assigned) people:
	Champions:
	Other Assets (partners, experts)

Threats	Threat:
	Response:
	Threat:
	Response:
	Threat:
	Response:

Contingency Plan and Exit Strategy	Trigger: Response:
	Trigger: Response:

AFTERWORD: MANAGING STRATEGIC CHANGE

In 1994, writing about the "age of social transformation," Peter S. Drucker describes what the editors of *Atlantic Monthly* called "an economic order in which knowledge, not labor or raw material or capital, is the key resource." In the essay, as he writes about the rise of the knowledge worker, Drucker makes it clear that the move toward a "knowledge economy" is more than simply a rearranging of the workforce:

> The rise of the class succeeding industrial workers is not an opportunity for industrial workers. It is a challenge. The newly emerging dominant group is 'knowledge workers.' …the great majority of the new jobs requires qualifications the industrial worker does not possess and is poorly equipped to acquire. They require a good deal of formal education and the ability to acquire and to apply theoretical and analytical knowledge. They require a different approach to work, and a different mind-set. Above all, they require a habit of continuous learning.

As Drucker was helping us understand the basic differences between what was expected of workers in previous societies and today's knowledge workers—which term he had coined in 1959—an additional and critical attribute of the new workplace was being identified. During that same last decade of the previous century, John P. Kotter and other influential management leaders were stating that those same knowledge workers would also be required to manage change, to not only identify the changed work environment in which they were expected to perform but to adapt to the requirements of change, to ensure that the parent organization would continue to thrive.

INEVITABLE AND DESIRABLE CHANGE

Change is recognized as inevitable and desirable. Change influences the organization's knowledge thought leaders as they seek new and better ways for delivering services.

As a fundamental component of the management function (and as noted at the beginning of this Management Action Plan), change is now recognized as inevitable. If pursued properly and with an eye toward long-term improvement, it is also desirable. This recognition continues and will continue to have much influence on how the organization's knowledge thought leaders—and the people for whom knowledge services are delivered—succeed in their work.

With knowledge services, performance and innovation are uniquely connected, as those with responsibility for managing knowledge services seek to find new and better ways for delivering services to identified constituent users. We speak about knowledge services as putting knowledge management to work, the practical side of KM, and managing change in that context was connected, perhaps unwittingly, by Drucker in his *Managing in a Time of Great Change*. In the book,

Drucker described change management and entrepreneurial thinking in a quotation that is almost custom-made for information professionals and knowledge thought leaders:

> An organization must be organized for constant change. It will no longer be possible to consider entrepreneurial innovation as lying outside of management or even as peripheral to management. Entrepreneurial innovation will have to become the very heart and core of management. The organization's function is entrepreneurial, to put knowledge to work—on tools, products, and processes, on the design of work, on knowledge itself

It is a difficult and sometimes complicated affair, this "putting knowledge to work." In fact, the expectations (and aspirations) captured in the phrase had entered the lexicon of the knowledge worker as early as 1916, when it was adopted as the official slogan of the Special Libraries Association (SLA). As that organization and its service delivery emphasis on practical and utilitarian service delivery for information, knowledge, and strategic learning moved forward in the 20th century, we can see a natural transitioning into knowledge service's objective of putting knowledge management to work. It is not hard to see why. Putting knowledge management to work and identifying the practical side of KM—and then developing applications in support of the practice—must by definition connect to doing things differently, to changing behavior and the thought processes that underlie behavior (when behavior is thought about at all).

The Four Principles of Change Management

1. Sponsorship
2. Champions and Change Agents
3. Organizational Readiness and Managing Resistance
4. Communication Planning

To meet that challenge, smart information professionals and their leaders in the organization turn to change management. At this point in the history of management as a science and as a profession, there are many approaches to dealing with change, change management, and change implementation, but for many managers (including information professionals with management responsibility), the best place to begin is with established change management principles. The authors identify four fundamental principles for successfully managing change, and while recognizing that there are inevitably any number of sub-concepts that support and enhance successful change, the focus in the knowledge services environment is on generally on the following:

- *Sponsorship*. This change management principle identifies an influential leader who commits to a consultative role in the change process and agrees to express, model, and reinforce his or her commitment

- *Champions and Change Agents*. The emphasis here is on identifying and obtaining commitments from influential people willing to speak about the benefits of change and who will encourage adoption (champions are usually thought of as early adopters and change agents as individuals who will express and model the new behaviors to a population of users).

- *Organizational Readiness and Managing Resistance*. This change management principle recognizes that users and affected stakeholders are engaged early in the process and, when appropriate, invited to participate in general discussions about the change and—in some situations—to participate in planning change. This principle essentially diffuses resistance or, at the very least, gives those resisting an opportunity to be part of the effort to enable useful and productive change.

- *Communication Planning*. Of critical importance, this change management principle engages users early in the process and connects with the above principles in a coordinated and consistent manner. An example of an effective application of this principle is the development of a calendar of events or project plan that incorporates elements of a consistent message in language that matches that of the organizational culture in which the affected stakeholders are employed.

The Basic Steps of Change Management
- Conceptualize
- Prepare the organization
- Organize the planning group
- Plan
- Decide
- Manage the individual
- Surface and address resistance
- Implement
- Evaluate
Susan Curzon

When looking to enter into the change management process for knowledge services, good background directions can be found in Susan Curzon's basic list (noted at left), provided a generation ago. Of course the first step is conceptualization, and in any organizational effort, moving toward a new or different management framework requires those with management responsibility to begin their thinking and their discussions with their colleagues.

Before change management can begin, though, good intentions must be tempered with a strong dose of reality, with asking a fundamental question: Is the organization (or its knowledge services business unit) ready for change? It is all well and good to *want* to seek to transition the enterprise to a knowledge culture. It is quite another thing to take on such responsibility if the organization is not "change ready," as we generally put it. About ten years after Curzon, both Rick Maurer and Rosabeth Moss Kanter took on the study of organizational change readiness since, for the two of them, the success of any change process depends on the outcome of this determination. Maurer offers specific guidelines that continue to relate well, especially for knowledge services, and he advises organizational thought leaders to:

- Build a foundation. Ask how you can cultivate a strong relationship with those affected by the change, or how you can use the change to build relationships with other stakeholders.

- Communicate with constituents. Provide a context and a compelling business case for the change and, when you can, engage in face-to-face conversation about the change and its implications. At the same time, find ways to communicate informally with people at all levels in the organization about the change, throughout the life-cycle of the change.

- Encourage participation. To what extent are you identifying all the individuals and groups that have a stake in the outcome? Have you found way to involve them in the planning making decisions?

- Expect resistance. No matter how well change is planned, resistance will occur, so you must make special efforts to monitor people's acceptance or resistance to the proposed change and, at the same time, engage people in dialogue so that their concerns can be heard and understood.

- Create rewards and benefits for stakeholders. Have you found ways to demonstrate that the change will be mutually beneficial for all stakeholders? How do the affected people know that the change will benefit them?

- Lead the change skillfully. Finally, you must take special steps to ensure that you have created alignment among diverse interests, that critical feedback is invited and will be given serious attention, that the compelling vision that you and your fellow change leaders have created is articulated to all stakeholders, and that people are informed about the change as it moves forward.

Kanter, when asked how organizational leaders get past "the rhetoric of change," replied with characteristic directness, offering three key steps for information professionals and their organizational managers:

- They put actions behind their words; talk is cheap. Leaders that do the best job of leading change—first of all, they have a vision of where they want to go that's well-articulated, communicated wisely, and communicated repeatedly. That way, everyone has a sense of the destination. There's no point in talking about change if you don't know where you want to go.

- Second, they look for exemplary practices—innovations—that are already occurring in the company that reflect the new way that they want to operate. Leaders puts those in front of people as tangible models of what can be done.

- Third, they organize to manage a change process in which projects help move the company to a new state of being. And they put real resources into it. Leaders give people responsibility. They set in place new measures that tell people what the standards are and measure progress toward the goals. They give feedback to an organization. They look to see whether policies, practices, systems, and structures support the change goals.

Kanter's advice is particularly appropriate as information professionals with management responsibility for knowledge services turn their attention to the specifics of change that are required in the workplace. In moving to an organizational knowledge culture, particular attention must be given to ensuring that the relevance of the function continues and is not dissipated by external and non-essential distractions. At the same time, staffing for a knowledge-centric organization requires new and specifically developed skills and competencies which naturally include the ability to adapt to change. This sometimes over-whelming picture is all part of the transformation of the service delivery focus for knowledge services, and information professionals and knowledge thought leaders must recognize the enormous role of the larger and over

Change of any type can be pursued successfully only with a thorough understanding of overall organizational culture, and how that culture is likely to react to the change being sought. A potentially negative reaction need not derail change, but it must be taken into account in pursuing that change.

-arching organizational culture and its influence in determining success or failure in managing change. John P. Kotter—to become one of the most famous experts in change management—published his famous "eight-stage process for creating major change." As Kotter sees it, organizational change must be "anchored" in the culture, which means that information professionals and others with responsibility for moving the organization to a knowledge culture must make every effort to understand the larger organizational culture before they attempt to make the change. In his book on the subject, Kotter suggests that successful change management has four particular characteristics which we can see relate specifically to change management in the knowledge services environment:

Successful change depends on results, since new approaches usually sink into a culture only after it is very clear that they work and are superior to old methods.

- Successful change requires a lot of talk, for without verbal instruction and support, people are often reluctant to admit the validity of new practices.

- Successful change may involve turnover, since sometimes the only way to change a culture is to change key people.

- Successful change makes decisions on succession crucial, since if promotion processes are not changed to be compatible with the new practices, the old culture will reassert itself.

Kotter then puts forward his eight-stage process, advising those responsible for managing change to:

1. establish a sense of urgency

2. create the guiding coalition

3. develop a vision and a strategy

4. communicate the change vision

5. empower broad-based action

6. generate short-term wins

7. consolidate gains and producing more change

8. anchor new approaches to culture

Obviously the transformation of any knowledge-centric organization into an enterprise built on a knowledge culture, with its broader and more demanding knowledge services responsibilities directed to a larger marketplace, is essentially an operational restructuring. At the same time—and surprisingly still posing a challenge to the successful development of a knowledge services structure—connections with information technology continue to come into play, as can be seen in the description of change management published by Ann Rockley in 2003, a definition that can—with a little imagination—be transferred to a definition of change management for knowledge services:

> Change management is managing the process of
> implementing major changes in IT, business processes,
> organizational structures, and job assignments to
> reduce the risks and costs of change, and to optimize its
> benefits. Change management is focused on the issues
> of managing the resistance and discomfort experienced
> by people in an organization when new processes or
> technology are introduced.

As Rockley makes clear, for many people the tasks associated with
change are difficult. In dealing with (or at least attempting to deal with)
that resistance and discomfort, organizational leadership has a
responsibility to recognize and attempt to understand the various
barriers that inhibit change.

There are, of course, practical guidelines for dealing with resistance,
and Sharon Penfold discovers useful and commonsense advice provided
by experts in the Human Resources field:

- identify the type of resistance (expected as well as in evidence)
- analyze (based on the factors of intensity, source, and focus)
- look for behavior (emotional) and rational (system) factors
- view resistance as rational, not irrational
- ask what useful purpose the resistance is serving
- identify real or perceived negative consequences of the change
- weaken the apparent link between the change and the negative
  consequences
- reduce rather than eliminate resistance (e.g., avoid surprises, ensure
  participation)
- work directly with individuals affected to deal with their personal
  concerns
- use a mix of push and pull styles to influence individuals,
  dependent on each situation and individual.

From the perspective of many managers, change and change-related
activities are traditionally considered—and are expected to be—
disruptive and painful in the workplace, but that does not necessarily
have to be the case. With a clear understanding of the elements of the
change management process that support and enhance knowledge
services, change can proceed for the common good. Indeed, for many
leaders in the field, a focus on resistance is less productive than an
emphasis on the benefits, and, as Lyndon Pugh accurately describes,
"managers have already at hand the tools to do this, in addition to their
skills in understanding the psychology of the people they work with."

The key motivational structures, for Pugh, are job enrichment, job
enlargement, and team structures. With them, Pugh connects successful
change management (as do the present authors, as noted below) with
Maslow's recognition that an essential higher order need is self-esteem,
coming from, as Pugh puts it, "a belief in one's own ability and also in

one's value to the organization" and involving self-analysis and the achievement of "a realistic and honest view of one's capabilities." Such success also means that for managers, there is an obligation to encourage people to understand what they can accomplish and to provide support for them to do so. At the same time, change management, in Pugh's assessment, "involves that most difficult of things, particularly for managers, that of seeking and accepting feedback from others."

Pugh also gives a generous and surprising nod to R.H. Cox, who writes about self-esteem in sports: "Learning and development," Pugh writes, "…play a part in increasing self-belief," and he notes that—from the change management perspective—self-esteem is important for the long-term, an "essential pre-requisite for sustaining motivation. Once [self-esteem] is weakened, high-achievers become risk-avoiders."

Pugh then provides his own lists for success with change management, for ensuring that—as we would frame it—the fear of "imposing" a knowledge culture is offset by a willingness and a desire to work with change management and change implementation principles to bring about a knowledge culture. In his first list (left), Pugh describes how managers bring about change success, to make the enterprise an interesting place to work.

Pugh follows this advice with a good list of specific managerial actions that will, he states, lay the foundation for a well-motivated workforce. To accomplish this important goal, managers need to

- Convince people what they can achieve in the new environment
- Design jobs to permit development and learning
- Engage in real and ongoing structural change
- Foster cultural change
- Develop and sell a vision
- Give people responsibility
- Communicate
- Change themselves
   (and take a good look at their own management patterns)
- Dispense with bureaucratic behavior

When change management for knowledge services works, there is no better time to be the knowledge thought leader for the organization. A fine example was published in 2007, in Linda Stoddart's description of the development of a knowledge sharing strategic framework at the United Nations. The changes put in place resulted in many solid accomplishments, but of particular importance was the success of the change management process in creating a sense of community with respect to knowledge services. As described by Stoddart, "A sense of community has been fostered by the creation of a network of local points providing content across the organization worldwide…. This community approach has helped encourage knowledge sharing and a transition toward a more collaborative organizational culture."

How Managers Ensure Successful Change

- Make work challenging
- Give people the responsibility for organizing themselves and let them choose how they work
- Give people power
- Help people learn
- Use every channel of communication possible "and tell people everything you can"
- Share leadership
  Lyndon Pugh

> "Establish a sense of community by creating a network of local points to provide content across the organization."
>
> —Linda Stoddart
> United Nations

Notably, in this work the capture of the incremental steps Stoddart and her team undertook provide a strong model that, not surprisingly, incorporates important directions and reinforces their validity:

- Articulate the goal and establish focal point community
- Conduct a knowledge services audit
- Create an internal communications working group
- Reach out to all stakeholders
- Conduct planning and strategy focus training workshops

In recognizing and attempting to understand and ameliorate barriers to change, enterprise leadership carries out one of management's most important responsibilities, the ability to sponsor success. The concepts we connect with sponsorship are often described in these Management Action Plans, included in a variety of contexts. Equally critical though (if not more so) is the role of sponsorship with respect to change management. Whether required for a single operational function or enterprise-wide, change cannot succeed unless senior management agrees to be involved and, indeed, to sponsor the change. When Drucker defined entrepreneurial innovation as the very heart and core of management, he was establishing that change must be recognized and managed, and it is in leadership provided by change sponsors that change succeeds.

The larger organization does, of course, include other people who have an interest in and perhaps enthusiasm for the success of the KD/KS process, and who are willing to be part of change as the process evolves. As noted earlier, partners and other knowledge workers who engage with the functional unit responsible for knowledge services are quick to speak about how valuable the products, services, and consultations of the unit are in their work, and in their collaborative work together in inter/intra-departmental projects, they come to know knowledge services well. But knowing and being in a position to influence change are two different things.

Likewise the good intentions of champions and advocates. These enterprise colleagues may or may not avail themselves of the contributions of the knowledge services function to their work. And while they may have good "feelings" about the place of knowledge in the organization, they are not in a position to do much more than say so, and often only when prodded or encouraged so to do. They are individuals who understand the role of change in the larger organization and who are interested in seeing change attempted but like the partners described above, they are not in a position to lead the change.

Slightly up the change-management "chain," so to speak, are the organization's change agents. These people—found at all job levels—are people who can help with the change by providing influence where it is needed. While your champions and advocates can speak as early-adopter users who understand the benefits of the change, change agents

are individuals the knowledge thought leaders have identified as people who can be indoctrinated to not only take advantage of the change but who are in a position to model the changed behaviors to a population of users.

Enter the knowledge sponsors. These enterprise leaders understand the KD/KS value proposition. They are senior managers who have learned—either through experience or through their interactions with the organization's knowledge thought leaders—that the knowledge services function brings tangible and measurable benefits to the larger organization. They make it their business to authorize, validate, and demonstrate ownership with respect to knowledge services, and they take a consultative role in working with the information and knowledge specialists who have responsibility for the success of the knowledge services function. Quite often in supporting the idea of the enterprise as a knowledge culture, these senior leaders enter into a sponsorship agreement with the larger organization, outlining mutually accepted and agreed-upon actions they will take to express, model, and reinforce their connection with knowledge services. Working with the organization's information professionals and knowledge specialists— who now take on a catalysis role in change management analogous to the role they have in knowledge services—knowledge sponsors ensure that the place of knowledge services is indeed one in support of the organizational knowledge culture.

> **Sponsors**
>
> Sponsors are senior leaders who enter into a sponsorship agreement for knowledge services with mutually accepted and agreed-upon actions to express, model, and reinforce their connection with the knowledge services function.

For an example, we might look back at an earlier approach to change management. Many remember an advertising campaign of several years ago, one which asserted that "change imposed is change opposed." Today, in some circles, the same is said about knowledge services, that the development of a knowledge culture cannot be imposed upon a group of workers or made obligatory, at any level. No one disputes this but some even posit that there is no advantage to be gained in attempting to create a knowledge culture for an organization, institution, or enterprise. The present authors beg to differ. While we agree that imposed change is quite naturally wrong, if the goal is important enough, as we believe it is when we speak about the value of organizational success in an enterprise managed as a knowledge culture, the organization's leaders can—and indeed have an obligation to—identify how the principles of change, change management, and change implementation will lead to the desired effect they envision for the larger organization.

A Change Management Strategy for Knowledge Services

When preparing the organization for developing and sustaining an enterprise-wide knowledge culture (and implementing the principles of knowledge services to do so), change management takes on a different or "special" cast. As we pursue our discussions about how we will lead the change, the situations are very appealing, because they enable us to envision just how good we can make our workplace. On the printed page or computer screen and in our conversations with our colleagues, it all looks very nice. The apparent ease of transition from idealized and theoretical KM to the practical, day-to-day workings in each situation appeal to the tidy and methodical perspective that many of us bring to our work.

But there is a different side to the story. Organizational change is hard, and while it is often not too difficult to articulate a new strategy or a re-structuring, or to demonstrate the potential value of a desired result (as described earlier in those references to the pleasant intellectual discussions that take place), bringing any change into an organization is going to be difficult.* Hopefully concepts and ideas like those described in essays like this are helpful, but even when they are, we are forced to wrestle with dealing with change management and change implementation in our specific organizational environments.

What is hard—indeed, the hardest part—is getting the larger organization to understand the value of the change and to then accept the change as it becomes part of the organizational effort. As we speak about so often—almost unendingly in the management community—people and organizations just naturally seem to resist change. Nevertheless, if information professionals and knowledge workers truly desire to participate in the process of moving the organization to a knowledge culture, and indeed, to lead the process (which they should do), there are steps we can take:

1. *Define the change.* If we are not sufficiently clear and precise about what will be required (not just the desired end result but the activities that will be needed to achieve that result), it will be far too easy to resist or passively avoid any desired change. In terms of moving to a knowledge culture, to establishing a KD/KS framework for the knowledge transfer process in your organization, let the concepts and specific roles described here provide you with talking points, a basis for articulating the specific changes you desire to the people who can help you initiate change. This leads to….

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* The techniques offered here are standard human change management principles. Interested readers might refer to Chip Conley's *How great companies get their mojo from Maslow*, which relates Maslow's hierarchy of need to change management, a connection with particular resonance as information professionals and other knowledge workers seek to prepare themselves for their profession's future role in society.

2. *Find your sponsor*. Before you begin, ensure that you can establish strong sponsorship for whatever change will be required. Despite the verbiage that supports "grass roots" ideas and discussions about "demonstrating feasibility," there is a strong need for an advocate or champion (or several) to take a stand. Additionally, that person or group of people is going to be required to move from simply championing the change ("that's a good idea") to actual participation ("what you're proposing will impact my work—I'll support it, I'll tell people how this helps me and the company, and I'll reinforce the change"). Usually there is a point in the change process where people's behaviors and decisions need to be influenced on a substantial scale. That can't happen unless there is leadership buy-in and a commitment to buy-in that is expressed in the words and actions of enterprise leaders.

3. *Create alliances and identify change agents*. The organizational shift to a knowledge culture is initially the result of an alliance (or in many cases a group of alliances). Utilize the various elements of the many definitions of KM that fit your situation, match them with information management and strategic learning in knowledge services, and work to establish a KD/KS environment with knowledge services as your management methodology and service-delivery focus tool. Then integrate those alliances. Start with like-minded functional leaders and thought leaders in your organization and join with them, with all of you working as change agents and identifying areas where you and they share concerns related to the full range of information/ knowledge/strategic learning interests. Look for areas where knowledge sharing is needed but is not taking place or not working well, and engage with these colleagues to come up with integrated solutions. The end result will benefit all business units in the organization, realizing an enterprise-wide holistic solution.

4. *Use caution*. Be wary of quick fixes and reactive responses.* When there is an established desire for improvements in the knowledge transfer process within the organization, leading, perhaps, to the beginnings of a knowledge culture, many of the players (including sponsors) naturally start to look for mere tools or techniques. What you will hear is "Ah, hah! Now we are ready for KM/knowledge services. Find me the best software application and let's make this happen!" Be careful. It's not just about software.

Keep in mind that at this juncture in the knowledge services process you will be required to reiterate to your colleagues and your organization's leaders that culture shifts require new ways of doing work and new ways of relating to stakeholders in the enterprise, and in addition to strong reinforcement from sponsors, you will require a variety of approaches and tools. Understand clearly that you will need a comprehensive approach that involves the spectrum of KD/KS

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* Not to be confused with quick wins as incremental steps towards the overall objective, as these can be powerful change forces.

solutions and the integration of appropriate functions and approaches. With such an approach, you can position yourself to ensure higher value realization and smoother change management, resulting in real, sustainable change for the larger organization. This is the hard work of knowledge services. Putting knowledge management to work and using knowledge services to enable your practical solution is hard. But it can also be said that putting knowledge services in action is the most rewarding part of the entire effort.

THE ORGANIZATIONAL KNOWLEDGE NEXUS: A CAUTIOUS PREDICTION

This Management Action Plan concludes with a guarded prediction about knowledge transfer in the future. If our studies and observations demonstrate a continuing direction toward the acceptance of business value for knowledge (as we feel they do), and if, at the same time, enterprise leadership continues to strive for strengthened KD/KS throughout the organization, we expect this knowledge transfer process to take place in an organizational environment that of necessity will be established as a knowledge culture.

We also predict that the role of specialist librarians, information professionals, and other knowledge workers and their services to the organization will be one of knowledge leadership in this environment. This evolving role will be based on their knowledge expertise and their willingness to assume knowledge leadership for the larger organization, of being the organization's knowledge thought leaders and taking on responsibility for management enterprise-wide knowledge services. However that activity is currently structured or otherwise implemented in the organization, it will be strengthened if it is shaped to serve as a centralized function, a knowledge "nexus" or a knowledge "hub" for the larger enterprise.

Today's knowledge workers and knowledge leaders are the professionals who are best qualified to manage this function. Ideally, this operational function will assume formal responsibility for all information, knowledge, and strategic learning development, management, and delivery for the larger enterprise. This centralized "nexus" function will indeed be a function. It will probably not be a space or a "place" (unless as an operational function it has responsibility for maintaining a collection of artifacts such as books, bound journals, and the like, but that is another story). In our envisioned (and perhaps somewhat idealized) scenario, the knowledge nexus—the knowledge services delivery function and the management of knowledge assets—plays a comprehensive and holistic role for the entire organization and makes a tangible and measurable contribution to mission-critical success.

Even in complex organizations, or in organizations that cannot support such a commanding role for a knowledge-focused operational function, the power of such an embedded and visionary philosophy can effectively move traditional "reactive" service delivery (and even "proactive" service) to higher levels of organizational impact. It is a strategic approach that not only allows the natural synergies among the disciplines that are the elements of knowledge services (information management, knowledge management, and strategic learning) to succeed. Indeed, with this approach there is the added opportunity of taking on a more interactive and integrated function across the larger enterprise and (perhaps more important) an integration opportunity with specific business processes. In fact, the more of this latter integration there is the more progress the enterprise can make towards building that knowledge culture to which so many organizations aspire. It is a scenario that today's information professionals and knowledge workers can envision for themselves and, with considerable enthusiasm, work toward achieving.

For information professionals, specialist librarians, and other knowledge workers, the future looks bright. They are—or will become—the knowledge thought leaders, knowledge consultants, and knowledge coaches for their parent organizations. They recognize that putting KM to work is critical to their and their organizations' success, and they delight in bringing a practical approach to their work through the convergence of information management, knowledge management, and strategic learning. As organizational leadership and management come to understand the relationship between technology and knowledge and to understand better the relationships between quality in knowledge transfer and organizational success, knowledge services—as a management and service delivery methodology—becomes the route to that success. These information professionals are prepared and ready to play their part, leading their organizations in the creation of knowledge value through KD/KS.

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