Organizational Knowledge and Systems:
The Customer Care Connection

KM and Knowledge Services

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Organizational Knowledge and Systems:
Information Management, KM, and Strategic Learning

- Customer Service as an Operational Function
    - Customer Care: Foundation of Corporate Marketing Strategy
    - Customer Care: Matches to Corporate Knowledge Services
- Knowledge Services: The Information-Knowledge Strategy Link
    - Definitions – "Talking the Talk and Walking the Walk"
    - Knowledge Strategy Development
        - Marketing strategy and knowledge strategy
        - External Expertise
        - Internal consultant or marketing knowledge strategist
    - Strategy Framework
        - Inspirational/Aspirational
        - Practical/Step-by-Step/Actions, Milestones, and Results (Deliverables)
- Change Management

Organizational Knowledge and Systems: Information Management, KM, and Strategic Learning

- **Your Challenge in Managing Knowledge Workers:**

  "Knowledge workers know they can leave. They have both mobility and self-confidence. … they are interested in personal achievement and personal responsibility – which means they have to be put in the right job. Knowledge workers expect continuous learning and continuous training. Above all, they want respect, not so much for themselves but for their area of knowledge. Knowledge workers expect to make the decisions in their own area.

  "Action point: Manage knowledge professionals as volunteers by defining for them what the company is trying to do and where it is going. Put them in the right job and offer them educational benefits. Respect them and their areas of expertise. Allow them to make decisions in their own areas."

  The Daily Drucker (June 13)
  Quoted from: *Managing in the Next Society*

Organizational Marketing/Knowledge Strategy
(A typical project framework)

Phase 0: Scoping/ Project Prep

Phase 1: Needs Assessment/ Objective Development

[Knowledge Audit]

Phase 2: Strategy Development

Phase 3: Solution Development

Generate and Defend Recommendations

Phase 4: Present Recommendations

(Solution Implementation)

The Information-Knowledge Strategy Link
Knowledge Use and Knowledge Value

The Knowledge Culture

- intellectual capital recognized as the institution/organization's most critical asset
- collaboration – KD/KS – intellectual enthusiasm support corporate, institutional, or organizational goals

Knowledge Services

- information management, KM, and strategic learning converge for organizational effectiveness
- "natural" opportunities and applications in the business/organizational environment

The Knowledge Culture

"Shared beliefs and values about knowledge and the role of knowledge in the company or organization and, as appropriate, in the larger society"

Characteristics of the knowledge culture:

- Collaboration is a given – and expected – at all levels
- The role of information technology and communication in the knowledge development/knowledge sharing (KD/KS) process is acknowledged and enthusiastically embraced
- The intellectual foundations for the effort are respected – the intellectual quest is not disdained
- Ownership of the KM function is clearly established, with a carefully planned-out governance structure and a senior-level employee tasked to work with all organizational functions

Knowledge Management
The Definition Conundrum

An Enterprise-Wide
Knowledge Development/Knowledge Sharing
(KD/KS) Culture

Purpose:
Electronic Capture of
and/or
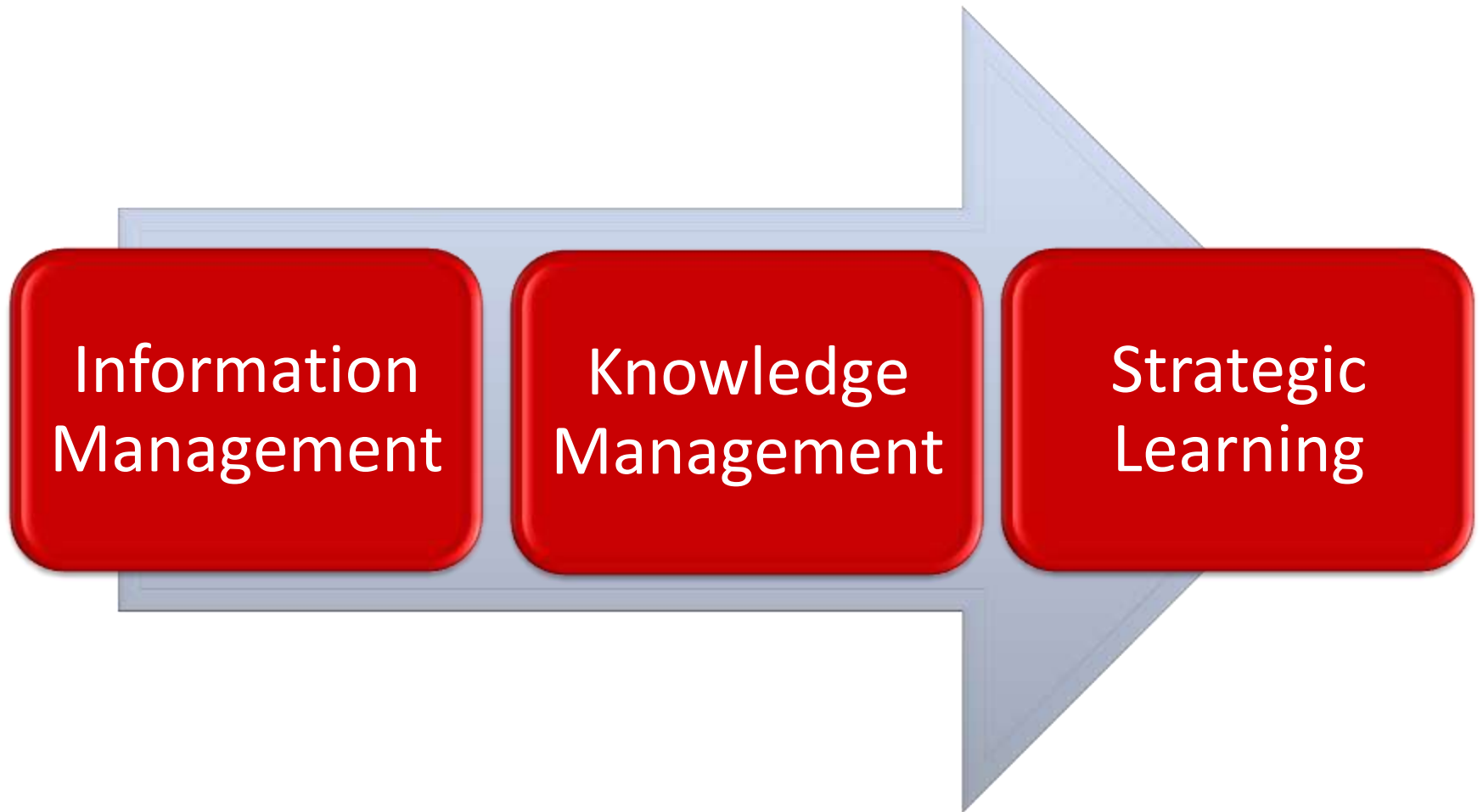Direction to
Knowledge Resources

**KNOWLEDGE
MANAGEMENT**

Function:
Working
With
Knowledge

Function: Ability to
Use Strategic
Knowledge

Characterized by:
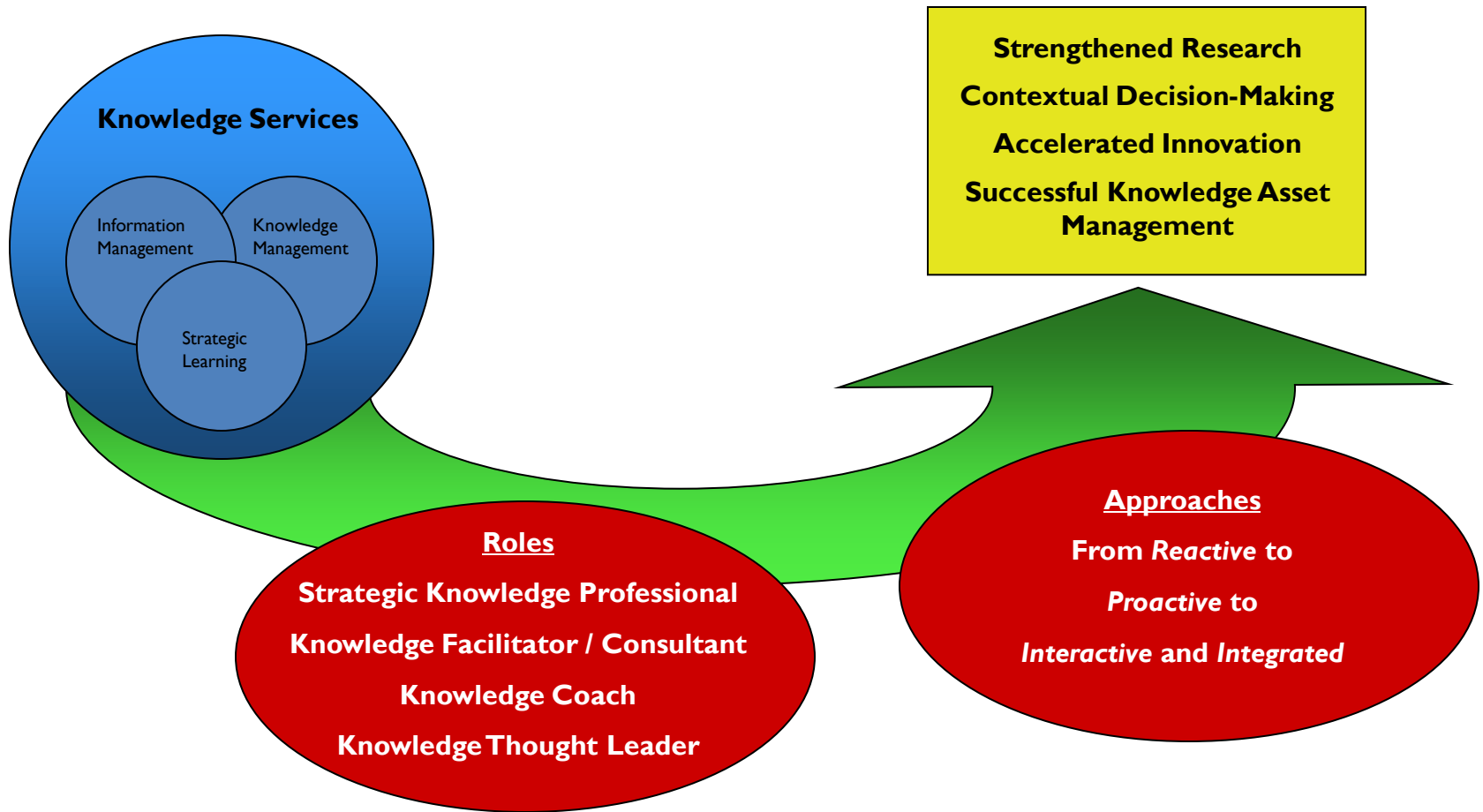Collaboration
Cultural Change
Business Focus

Core Components:
People
Processes
Technology

SMR – Building the Knowledge Culture: http://www.smr-knowledge.com

Knowledge Services

Information Management → Knowledge Management → Strategic Learning

Knowledge Services

Knowledge Services

Information Management

Knowledge Management

Strategic Learning

Strengthened Research

Contextual Decision-Making

Accelerated Innovation

Successful Knowledge Asset Management

Roles

Strategic Knowledge Professional

Knowledge Facilitator / Consultant

Knowledge Coach

Knowledge Thought Leader

Approaches

From *Reactive* to

***Proactive* to**

Interactive* and *Integrated

IT (ICT) and Information Management (IM)

- Information Management - a workplace methodology concerned with the acquisition, arrangement, storage, retrieval, and use of information to produce knowledge.

- IM – powered by information and communication technology (ICT): any product that stores, retrieves, manipulates, transmits, or receives information electronically in a digital form.

Knowledge Management (KM)

- Knowledge Management (KM):
  - a way of working - helps us manage explicit, tacit, and cultural information in ways that enable us – and our workplace – to re-use information to create new knowledge
  - an established atmosphere or environment in which KD/KS is established as the essential element for the achievement of the corporate mission

> But you can't *manage* knowledge. You work with knowledge
> KM is simply: *Working with Knowledge*

- KM – powered by KD/KS
  - through the utilization of IT/ICT (conventional wisdom)
  - in reality – the *human interface* – is now recognized as the critical element of KM

IT/Information Management and KM/Knowledge Management

Photo: Kentv

Strategic Learning

… the successful achievement of skills, competencies, knowledge, behaviors, and/or other outcomes required for excellence in workplace performance

… enables those who develop knowledge to share it, for the benefit of everybody in the workplace (i.e., combines knowledge development with knowledge sharing – KD/KS)

Or less pompously: *Strategic Learning* is anything anybody does to learn how to work better – to work smarter….

KM? Knowledge Services?
Which is it? What's it to be?

Past confusion between what is shared (knowledge) and the means used to share it (ICT/IT) was natural.

That confusion is now disappearing, once we bring in strategic learning.

Now we speak of *Knowledge Services*, the melding of the two never-very-distinct disciplines, as ICT/IT and KM converge with strategic learning, to release the power of knowledge, to ensure that knowledge is utilized to achieve corporate, organizational, or institutional goals.

KNOWLEDGE SERVICES: The *Practical* Side of KM
"Putting KM to Work"

TRANSITIONING

- Information, Knowledge, and Strategic Learning to *Strategic* Knowledge

ENABLING

- Contextual decision-making
- Accelerated innovation
- Strengthened research
- Excellence in knowledge-asset management

SUPPORTING

- An institution-wide knowledge culture
- Organizational effectiveness
- Supporting and contributing to the institutional knowledge culture

SMR – Building the Knowledge Culture: http://www.smr-knowledge.com

Knowledge Services:
The Information-Knowledge Strategy Link

- **Knowledge Strategy Development**
  - Something like "a set of actions or activities that will produce an established and/or agreed-upon goal"
  - Shawn Callahan: strategy is "a plan to be executed in the future to achieve specific objectives":
    - Strategy should be viewed as a combination of
      - the actions that are intended to result in anticipated business outcomes; and
      - the actions that emerge as a result of the many complex activities that are undertaken within an organization

                                                                Shawn Callahan

- **Knowledge Strategy:**
  - The organization's business strategy that "takes into account its intellectual resources and capabilities"

                                                                Michael Zack

[See SMR blog: September 30, 2010]

Knowledge Services:
The Marketing – Knowledge Strategy Link

- Customer Service (Customer Care):
  - Total organizational approach that makes quality of service – *as perceived by the customer* – the priority driving force for the operation of the business:
    - The expectation that a product or service will produce the benefits promised
    - The expectation that the service will be of the standard promised
    - The expectation that, if expectations are not met, the seller (provider) will make good on the promise
  - How good is your customer service? How easy are you to do business with?

Knowledge Services:
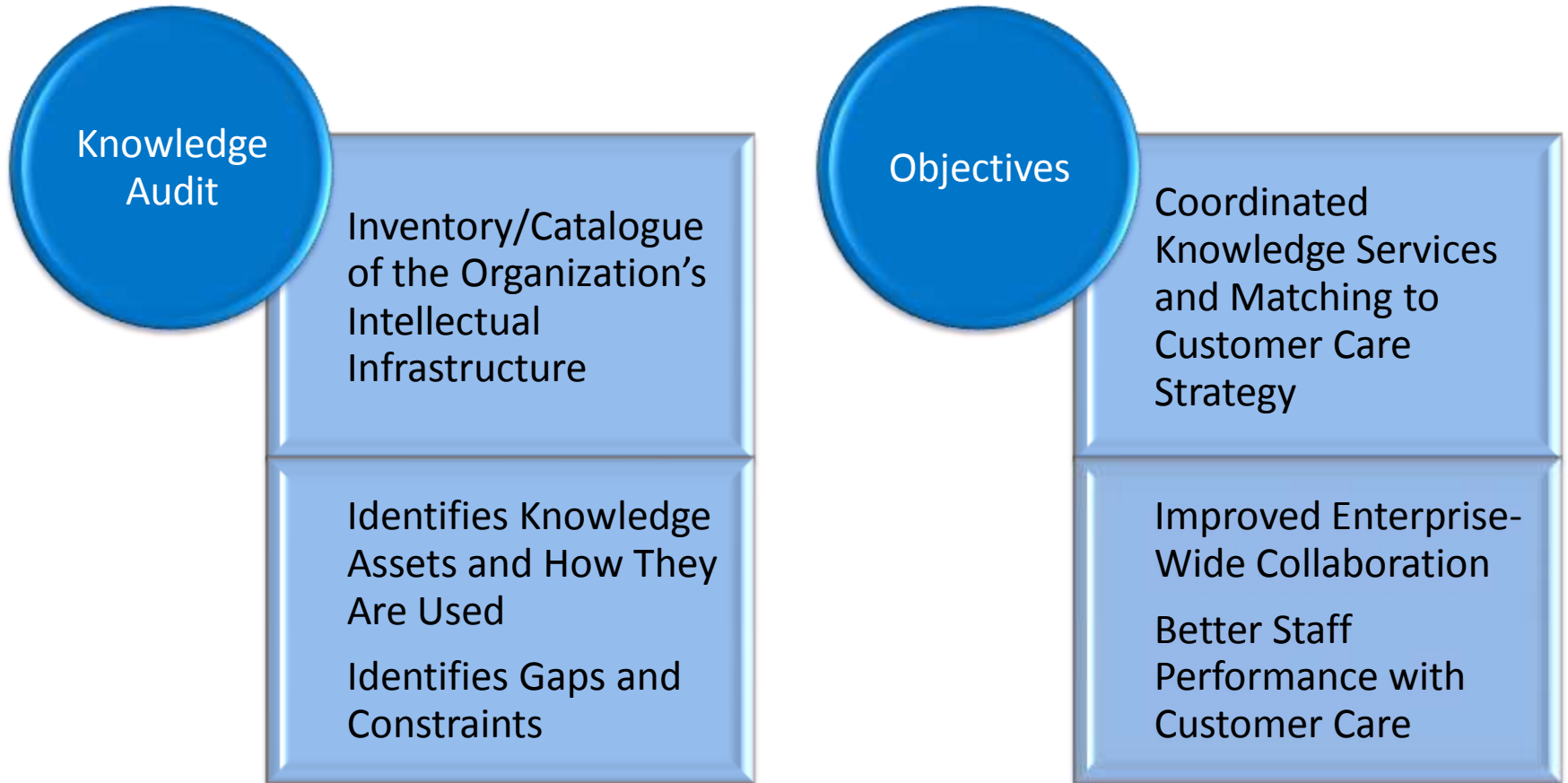# The Marketing – Knowledge Strategy Link

- Using Knowledge Services to Establish Customer Service (Customer Care):
  - The value of the service is determined by the customer – if we cannot provide them with what they need for *their* success, something is wrong
  - We want "repeat" business – the more we use knowledge services to support and measure marketing/customer service success, the more valuable we are to our company's success
  - We are service oriented – or we should be (if we don't like being responsibility for providing the highest quality of service delivery with knowledge services, perhaps we are in the wrong business)
  - It's what we're there for: knowledge services supports corporate and organizational effectiveness

Knowledge Services:
The Information-Knowledge Strategy Link

- Knowledge Strategy Development: The Players
  - Company/Organizational Management
  - *Knowledge Thought Leaders/Knowledge Strategists*
    [See SMR blog: November 10, November 17, 2010]
  - Internal Customer Services/Knowledge Services Consultant/Strategist
  - External Expertise

- Knowledge Strategy Development: The Product
  - Introduction (inspirational/aspirational)
  - Practical/Step-by-Step/Actionable Recommendations, Milestones, Measure/Metrics, and Results (Deliverables)

- Knowledge Strategy Development: Review
  - Best Practices
  - Lessons Learned
    [See SMR blog: June 8, 2010]

Knowledge Strategy:
The Enterprise-Wide Knowledge Function

Knowledge Audit

Inventory/Catalogue of the Organization's Intellectual Infrastructure

Identifies Knowledge Assets and How They Are Used

Identifies Gaps and Constraints

Objectives

Coordinated Knowledge Services and Matching to Customer Care Strategy

Improved Enterprise-Wide Collaboration

Better Staff Performance with Customer Care

Knowledge Services in the Company:
A Natural Ambiance for Collaboration

The Collaborative Impulse

Principle-based

The way people naturally want to work

Replaces hierarchy

Knowledge Services Responsibilities Across the Business/Organizational Environment

Research and Development

(CoPs, Knowledge Networks, Social Media, Web 2.0, Network Analysis, *etc.*)

Reports, studies, background and client content management

Enterprise-wide non-knowledge related functions (usually internal)

Records, archives, digital asset, knowledge services management

External relations (client/customer, other affiliates)

Strategy Development:
Purpose and Implications

For staff
- Strengthened research management
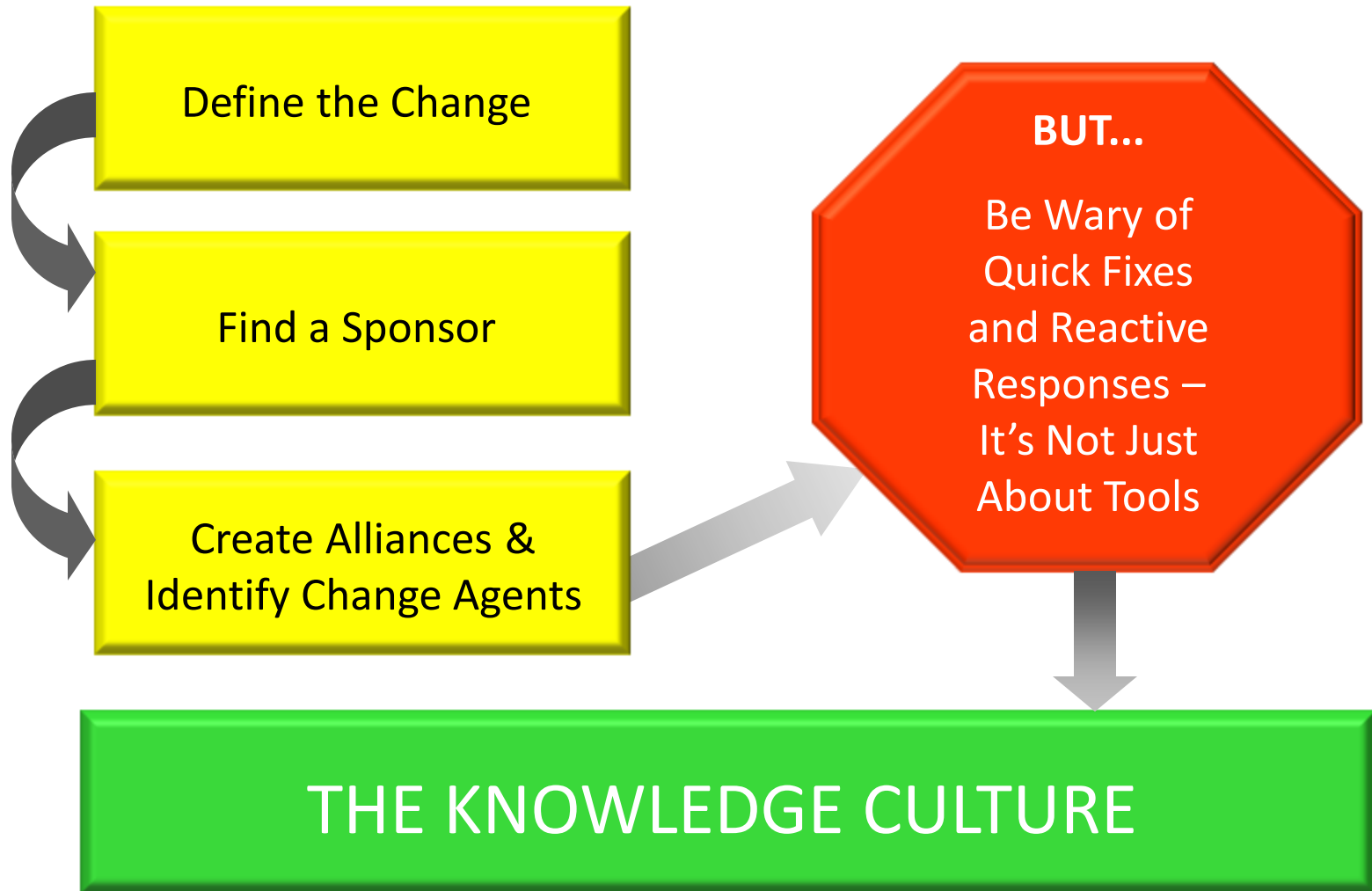- Subject-specific knowledge services for customer service and marketing

For management
- Development and sharing of content required for effective decision making
- Organizational KD/KS environment a given

For clients/customers
- Content/information currency
- User experience (UX) foundation for service delivery

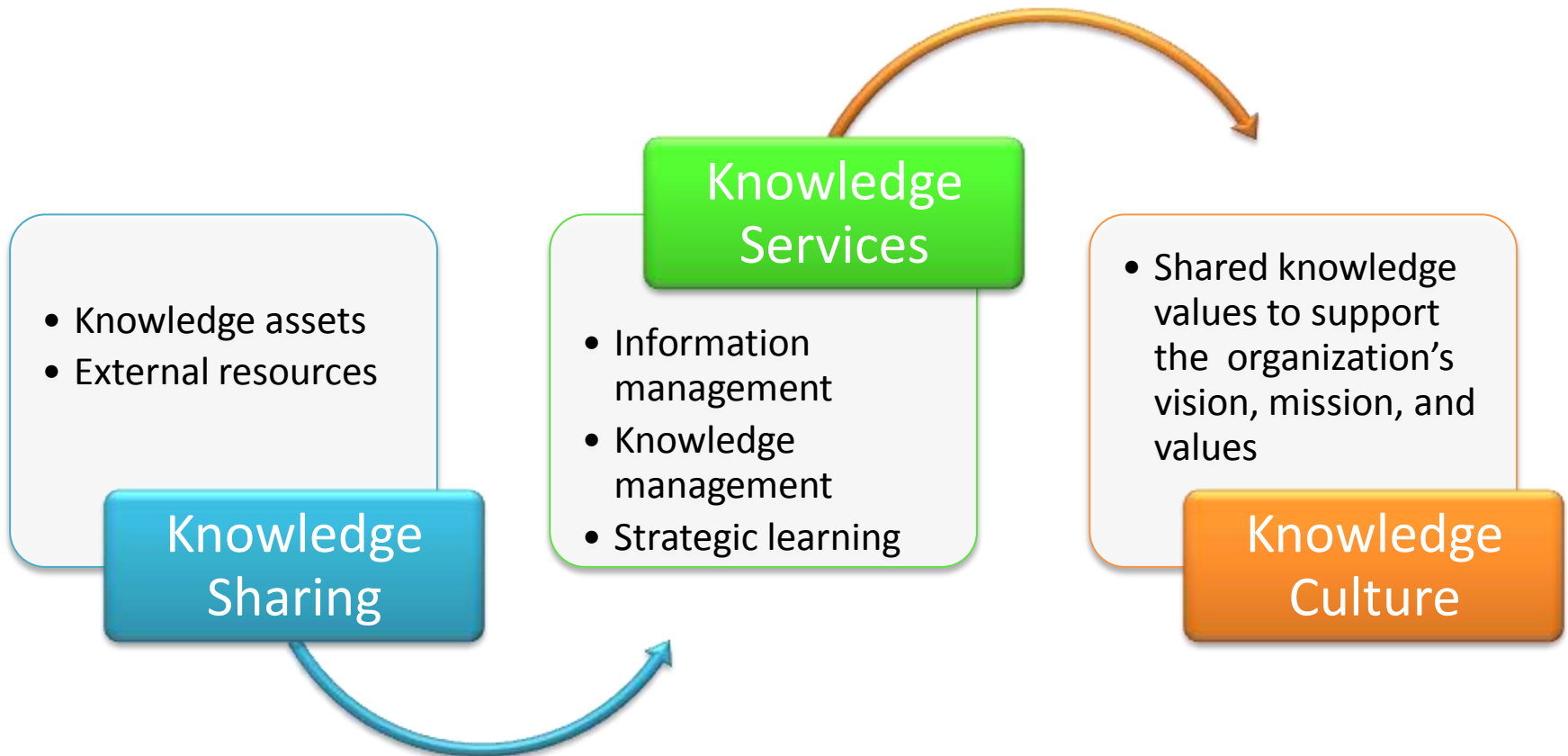# Developing Knowledge Strategy:
Managing the Change

Define the Change

Find a Sponsor

Create Alliances &
Identify Change Agents

BUT...

Be Wary of Quick Fixes and Reactive Responses – It's Not Just About Tools

THE KNOWLEDGE CULTURE

Leading Culture Change
Change Management for Knowledge Services

Articulate Goal

Establish focal point community

Knowledge services audit

Create internal working group

Outreach to all stakeholders

Planning and strategy focus workshop

An incremental approach to developing a knowledge sharing framework

Adapted from "Organizational culture and knowledge sharing at the United Nations: using an intranet to create a sense of community," by Linda Stoddart *Knowledge and Process Management* 14 (3) 2007

The Company's Knowledge Culture

Knowledge Sharing
- Knowledge assets
- External resources

Knowledge Services
- Information management
- Knowledge management
- Strategic learning

Knowledge Culture
- Shared knowledge values to support the organization's vision, mission, and values

Knowledge Strategy:
Knowledge Services in the Organization

Make No Small Plans.
They Have No Magic to Stir Men's Blood.

Daniel Hudson Burnham
American Architect (1846-1932)

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SMR International Blog: *SMR – Strategic Knowledge Resources*
                    (http://www.smr-knowledge.com)

Guy St. Clair Personal Blog: *Sharing Guy's Journey*
                    (http://gstcjourney.blogspot.com)

To Discuss – Organizational Knowledge and Systems: Information Management, KM, and Strategic Learning

- **Your Challenge in Managing Knowledge Workers:**

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