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Building the Knowledge Culture

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KNOWLEDGE STRATEGY: TAKE CHARGE

MOVE FORWARD AS THE KNOWLEDGE THOUGHT LEADER FOR YOUR ORGANIZATION

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QUICK TAKES:

Enterprise leaders now recognize that organizational success and organizational effectiveness relate directly to how well knowledge development and knowledge sharing (KD/KS) are managed.

Knowledge value is now understood. In today's well-managed company, enterprise leaders connect information management, knowledge management (KM), and strategic learning – the convergence referred to as “knowledge services” – as the driver for a new management emphasis in the company.

Making that connection re-shapes the organization as a knowledge culture, a workplace environment in which KD/KS is practiced as well as it can be practiced. A company built as a knowledge culture uses collaboration, open communication, and excellence in KD/KS to achieve its mission.

The organization's most valued employee is the knowledge strategist, the firm's knowledge thought leader. For knowledge workers seeking to take on more responsibility in developing and implementing knowledge strategy, here are ten steps:

1. Focus on personal and professional goals – is taking on the role of knowledge thought leader a job you want?
2. Does the organization need a knowledge thought leader?
3. How do things “work” in the company? How is KD/KS managed now?
4. Has KD/KS – as a process – been worked on before? What were the results? What resources were required?
5. Can you make a case for improved (better) KD/KS?
6. The knowledge strategist is a leader, and KD/KS leadership starts with change management. Can you “think big”?
7. Are you willing to conduct a thorough KD/KS assessment (“knowledge audit”)?
8. Are you willing to learn everything you can about strategy, so you can develop the corporate knowledge strategy?
9. Are you enthusiastic? You will be required to raise awareness about the company's knowledge strategy.
10. All things considered, are you willing to take on the challenge of moving the organization to a knowledge culture?

KEY WORDS: collaboration, communication, information and communications technology (ICT), information management, knowledge culture, knowledge development/knowledge sharing (KD/KS), knowledge management (KM), knowledge services, knowledge strategy, knowledge strategist, knowledge thought leader, management, organizational development, organizational effectiveness, strategic learning.

There has been a sea-change in organizational management during the last decade. Whether we are speaking about the management of a corporate enterprise, a not-for-profit or non-profit organization, or any of the many functional organizations that are part of any profession or line of work, we have witnessed (and continue to witness) an amazing turn-around in approaches taken by organizational leadership to ensure organizational effectiveness.

Primary among these is knowledge development and knowledge sharing. It is now clearly established that it is through the development and sharing of knowledge that we achieve organizational effectiveness, with the attendant utilization and commitment to digital information collection, storage, and access. When we connect this important mechanical advantage, with its massive opportunities for even more potential for KD/KS (as those of us working in the knowledge domain refer to knowledge development and knowledge sharing), we realize that we have indeed come to a remarkable time in history, a time when we have splendid tools and resources for taking advantage of KD/KS to achieve the organization's purpose.

Knowledge Use and Knowledge Value. We come to this conclusion by considering two connecting elements that influence what we know and understand about knowledge in our lives, and particularly about how we use and value knowledge. In the first we focus on the knowledge culture, and give some thought to the organizations where we work and their role as a knowledge culture.

A knowledge culture is in place in those organizations in which KD/KS is practiced as well as it can be practiced. Structurally, the knowledge culture is a knowledge-centric environment where stakeholders and affiliates have shared beliefs and values about knowledge and the role of knowledge in the organization, in their work, and – for many – in the larger society.

The second of these connecting elements has to do with the framework through which the knowledge culture is built and sustained. Here we look at knowledge management (usually referred to as “KM”) and to that outgrowth of KM we call “knowledge services” – the convergence of information management, KM, and strategic learning as a management methodology. When achieved through the organization's well-managed and well-implemented knowledge strategy, KM and knowledge services provide tangible and measurable benefits for the organization, with KD/KS as a core constituent organizational success.

The Knowledge Culture. In seeking to understand the role and value of the knowledge culture, we look at KM and knowledge services. We recognize that society (locally or globally) requires attention to knowledge, to KD/KS, and to how knowledge is used once it has been developed and shared. In the knowledge culture the success of every interaction rests on the quality of the knowledge developed and shared, and the organization cannot grow, expand, and evaluate its success without attention to the quality of the knowledge that forms the critical foundation of its success. In learning this, we have also come to understand that the much-heard-about “good enough” – in terms of information management, knowledge management, and strategic learning – only ensures the *status quo ante*. If we, as members of a group or organization (or society) aspire to *move forward* and to be *more than we are*, we must require the highest standards of excellence in knowledge services delivery. The knowledge culture we create and expect to sustain comes from and builds on the efforts of all of us to seek those highest standards of excellence.

So the goal is knowledge excellence, positioning the organization as a knowledge culture. To achieve this goal, to establish and recognize together that the knowledge culture is a valid institutional aspiration, we learn to talk about knowledge, to understand that knowledge (please forgive the oversimplification) is “what is known.” For most of us, we get more specific, for we are seeking to deal with practical and utilitarian information, information that leads to action based upon insight and experience or, as one colleague has described it, “knowledge is information that is used.”

The knowledge culture has several specific attributes. I generally emphasize three:

1. collaboration is a given – and expected – at all levels of the organization
2. the role of information technology (IT) in the KD/KS process is acknowledged and enthusiastically embraced
3. the intellectual foundations for the effort – for KD/KS – are respected and the intellectual quest is not disdained.¹

At the same time, for probably many reasons, the **management** of knowledge and the application of KM/knowledge services in many organizations do not yet seem to be strongly established. In my opinion, the distance between the two is not as far as some might suggest. For most of us, we already maintain beliefs and values about knowledge in the workplace that build on and connect with an understanding of the role (and value) of information, knowledge, and strategic learning, and we understand how these elements converge for the benefit of the organization. Those beliefs and values give us the direction we need to move the organization toward its role as a knowledge culture.

Getting to the knowledge culture was a development we might have predicted, for certain signs led us to KM and to knowledge services. As early as the 1980s, increased computer power put us all on guard that something important was happening. While some of the runes were misread (such as the prediction about the “paperless office” – remember that one?), there was no doubt but that the new field of information management and information science would enable sophisticated information capture and retrieval. Lynne Brindley, Chief Executive, The British Library, has described what happened:

The concept of the information strategy was emerging, whereby information and libraries were seen as important knowledge resources to be harnessed and increasingly treated as a strategic asset – to underpin teaching and learning, research and knowledge transfer activities – which needed to be valued and managed.

Information strategies emerged in the 1990s in universities, with more or less enthusiasm, and beyond universities the focus was on the discipline of knowledge management, the concepts of knowledge exploitation for competitive edge. There was recognition of the increasing economic value of information - of knowledge, both tacit (in people’s heads) and explicit (more formal), as a key element of the corporate assets of the business.²

Brindley went on to point out that a strong proponent in this recognition of the emerging knowledge-based economy was Thomas Stewart, who had defined intellectual capital as “intellectual material that is put to use to create wealth.” In doing so, Stewart had introduced the concept of KM (although it was not called “KM” at the time): “Intellectual capital,” he said, “is the sum of everything everybody in a company knows that gives it a competitive edge.”³

The movement toward “knowledge management” now began to make sense, and KM began to gain attention amongst leaders in the management community. And as management began to connect the electronic capture of KM elements with knowledge sharing, performance, and strategic learning, the advantages of KM began to fall into place (and, importantly, to be recognized as *corporate* advantages).

¹ St. Clair, Guy. *SLA at 100: from “putting knowledge to work” to building the knowledge culture*. (Alexandria, VA: Special Libraries Association, 2009).

² Brindley, Lynne. “[Challenges for great libraries in the age of the digital native](#),” National Federation of Advanced Information Services (NFAIS). Conrad Lecture, 2009.

³ Stewart, Thomas A. *Intellectual capital: the new wealth of organizations*. New York: Doubleday, 1997.

Yet there was still tension, for KM was not turning out to be the panacea it had been trumpeted to be (just as information technology itself had disappointed some managers when it did not meet expectations). For one thing, we had not been able to define KM, and that famous (and now nearly ubiquitous) “KM” was still floating around, with as many definitions as there were people attempting to define it. Stewart’s concept of intellectual capital was followed by a long decade of attempted definitions for KM, but we couldn’t make any of them stick. Why not?

The answer – after a few years and the attempts of many smart, well-qualified people – eventually became clear. It was a problem of semantics.

Knowledge Management: The Definition Conundrum. For a concept to gain acceptance, people have to understand what they are doing and what they are talking about when they describe what they are doing. In this case, describing knowledge management turned out to be a very real barrier to organizational acceptance. The *management* of knowledge is simply not possible, and knowledge *management* is simply out of the question. We cannot *manage* knowledge, as Larry Prusak and Tom Davenport – two of the early leaders of KM – put it, no more than we can “manage love, or honor, or patriotism, or piety.”

What organizational leaders really needed was to figure out how to *work with* knowledge. Indeed, *working with* knowledge became a valuable construct for those who wanted to take an organization’s intellectual infrastructure to a higher, more effective level, and led by Prusak and Davenport, we began to think of KM as simply *working with knowledge*.⁴

So by the early years of the 21st century, KM was not only awkward to describe, it was a difficult concept in the management toolbox, and its implementation was complicated and complex. There were a couple of reasons. One had to do management education, and Prusak and Davenport’s concerns about the phraseology were absolutely realistic. Most executives and managers were not educated to consider the role and value of knowledge as part of management, and they simply could not get their “arms around” – intellectually speaking – the idea of *managing* knowledge. At the same time – or perhaps a little later – there began to be confusion about information management, about the role of IT departments and offices, and their work in providing the electronic underpinnings for the digitized information that could be transformed into knowledge.

Knowledge Services. So we moved to knowledge services, a management and service-delivery methodology – a way to work – that converges information management, knowledge management, and strategic learning into a single over-arching operational function. As a management methodology, knowledge services recognizes that the most critical asset of any group or environment is what its people know, and this knowledge – this intellectual capital – is the organization’s most competitive asset. Moving to knowledge services provides the organization with the tools its people require for ensuring that the institution’s intellectual assets are captured, organized, analyzed, interpreted, and customized for maximum return to the institution.⁵

⁴ De Cagna, Jeff. “Keeping good company: A conversation with Larry Prusak.” *Information Outlook* 5 (5), May 2001.

⁵ St. Clair, Guy. “Knowledge services: your company’s key to performance excellence.” *Information Outlook* 5 (6), June 2001.

Made up of these three until-now disparate management tools, knowledge services is not a complicated concept, this idea of bringing the three tools together. And for most of us, we're pretty familiar with the terms, even if we don't always agree exactly on their definition.

Certainly we are all familiar with information management, the computers, the IT frameworks that keep our offices and our homes and, indeed, much of our lives running. In the workplace, with much of this carrying over into the rest of our lives, information management is a methodology that helps us keep all the digital "parts" in place. It is powered by IT, running any product that stores, retrieves, manipulates, transmits, or receives information electronically in a digital form.

Similarly, KM is our way of working, helping us deal with explicit, tacit, and cultural knowledge in ways that enable us – and our workplace – not only to generate new knowledge but to re-use what we know to create new knowledge. As a management methodology, KM is powered by KD/KS – the development and sharing of knowledge and – as conventional wisdom would have it – through the utilization of IT. But we know – and have learned very well – that in reality it is the human interface that is the critical element of KM.

So how does knowledge services work?

Here's one way to describe knowledge services, applying an analogy that became pretty popular not so long ago: Imagine an oil or gas pipeline. The pipeline is not of much use if it doesn't have any oil or gas passing through it. So it is with information management and knowledge – information technology supplies the pipeline, and the product that passes through it is the information that people need, the information they must work with, to turn into knowledge or, if it has already been generated as knowledge, to re-use to create new knowledge.

But we need more than the pipeline and the stuff that's flowing through the pipeline. With knowledge services the picture doesn't come together until we bring in strategic learning, our way of dealing with strategic knowledge, giving us a framework for enabling those who develop knowledge to share it, for the benefit of everybody in the workplace. Or, to be more specific, strategic learning is simply anything anybody does to learn how to work better, to "work smarter" as the popular catch-phrase puts it.

But sometimes this knowledge services construct seems a little too easy, a little too simplistic, and the question is often asked: cannot knowledge management do the job? Why must KM converge with information management and strategic learning to support enterprise success?

There are two reasons. The first is that in today's business and research environment, the management of information, knowledge, and strategic learning as unconnected activities (even when these activities are recognized as related) is insufficient.

The problem has to do with those "silo" or "stovepipe" issues we hear so much about. For several years, leaders in these three disciplines have been doing a good job of establishing their credentials and working in their particular area of expertise. Engineers and technical professionals, for example, made great progress in resolving the issues connected with managing information (with no small assistance from many, many intellectual leaders in other disciplines, it must be noted).

KM, too, when it came into the picture as intellectual capital, created its own body of practitioners although, as we've noted, at times it was a confused and amorphous coterie of people doing their best to bring some level of order out of the KM chaos.

And it was the same with strategic learning. In many fields, the development and provision of strategic learning as an operational function was given attention, and very successful tools and techniques for managing strategic learning were created and implemented.

But these efforts were not enough. Why? Because organizational managers, corporate executives, and even leaders in organizations and institutions that were not necessarily business-focused required a unified approach. For efficiency and for effectiveness, they needed an enterprise-wide knowledge strategy that included *all* strategic knowledge and would enable the enterprise to access and deliver *any* content connecting to any part of the organization and, not to be dismissed, to its success. They wanted to see a *practical* approach to managing knowledge.

Knowledge Services: The Practical Side of KM. And since they could not – quite understandably – grasp the idea of knowledge *management*, they had to be given something they could understand, a practical approach to servicing the knowledge-sharing needs of their employees, partners, affiliates, and anyone else with a reasonable interest in their organization’s effectiveness.

One thing executives did understand was the concept of services, enterprise support activities that are part of the organizational financial framework and included in that framework – as part of the cost of doing business – or contracted out and paid for. So it made sense for them to respond to the idea of services for knowledge sharing. Since they understood the purpose and function of, say, legal services, or accounting services, or HR services, they could understand the purpose and function of knowledge services.

At the same time, management leaders in organizations and corporations began to recognize that enterprise-wide knowledge sharing cannot take place through the outputs of discrete functional entities, and this brings us to the second reason why KM alone cannot do the job. With the build-up of these many separate and distinctive disciplines for handling knowledge content over the years – along with the concomitant growth of academic or academic-type education and training in support of those disciplines – organizations became flooded with functional units that were theoretically supposed to be about knowledge capture and knowledge sharing.

In reality, exactly the opposite happened. With functional units such as records management departments, specialized libraries, corporate archives, staff training and learning units, even information technology departments being created and put into place as individual and separate operational entities, no one was looking after *enterprise-wide* knowledge development and knowledge sharing. No thought was given to an institution-wide knowledge culture, one that would engage not only the usual knowledge-focused units of the organization, but *all* functional units (since they were all challenged to develop and share knowledge). The entire organization needed a practical way to deal with knowledge, to establish some sort of efficiency in each section and to be of benefit to the larger enterprise.

So we brought knowledge services onto the scene, to meet those needs.

Of course it didn’t happen immediately, or quickly. Indeed, the first suggestions about knowledge services as a practical approach to managing information, knowledge, and strategic learning were not until 2001 or so (as far as we can tell). Once identified and articulated, though, I am happy to report that this particular refinement of KM caught on, and now we have many organizations using and indeed exploiting knowledge services as the management methodology for knowledge sharing.

Remarkably, as enterprise leaders began to focus on knowledge services, very important things happened. Among these has been – and continues to be – a new emphasis on workplace roles

associated with knowledge sharing. There are still strategic knowledge professionals (information professionals, specialist librarians, records managers, archivists, and the like) identifying and organizing knowledge “artifacts” (including digital collections). Much of the substantive work of knowledge services, though, is now being done by people far removed from these fields, people with titles like “director, knowledge strategy,” or “knowledge coach,” or “knowledge thought leader.”

Their range of activity has enlarged, too, as knowledge services re-focuses organizational employees and affiliates from reactive or even pro-active interactions with one another and positions them as integrated and interactive knowledge sharers. In this workplace, people no longer wait to be asked to offer an opinion about how knowledge can be developed or shared. They simply do it. It’s a whole new world, this knowledge-centric workplace, and it now includes the attributes associated with the organization or the institution as a knowledge culture.

Knowledge Strategy and the Knowledge Strategist. It is becoming clear that today’s management leaders require an enterprise-wide knowledge strategy that matches the corporate business strategy. Everywhere I look, I see signs that we’re moving in that direction. You’ll recall the assertion I made at the beginning of this paper, that there’s been a massive turnaround in the perception of value with respect to enterprise-wide KM among enterprise leadership, regardless of the type of enterprise. In many companies and organizations, we now have an enterprise-wide recognition that KM, knowledge services, and knowledge strategy are critical to organizational success.

Building on that, we also recognize that in today’s management environment, a firm or organization’s most valued employee is the knowledge strategist, the knowledge thought leader who has the skills, the expertise, and the political savvy to pull together all the “silos” of the firm’s intellectual capital. There is now a critical role for the firm’s chief “go-to” knowledge executive, the knowledge strategist with enterprise-wide authority and responsibility for dealing with issues relating to information management, KM, and strategic learning. And – not so incidentally – the presence of the knowledge strategist in the firm brings added value that many people don’t often think about: a strengthened relationship between technology and knowledge, and a single knowledge strategist (or group of knowledge strategists) positioned to drive the firm-wide knowledge function.

It is this organizational or corporate *knowledge strategist* whose work is generally thought of as the management of knowledge services. With knowledge services usually defined – as we noted – as the convergence of information management, KM, and strategic learning, or, perhaps better put, as *developing and implementing strategies for managing information, knowledge, and corporate or organizational learning*, these activities provide focus for the knowledge strategist for matching the corporate knowledge strategy with the organization’s business strategy or mission. As employees, knowledge strategists are expected to design and plan knowledge-related activities and policy, and are particularly expected to give attention to future knowledge-related roles and activities that will affect corporate or organizational success.

And a very important distinction – with respect to the work of knowledge strategists – is that they are not necessarily people who have been educated to have or who simply possess “information skills,” not as we use the term to connect with the work of information professionals like specialist librarians, records managers, corporate archivists, and the many other information and knowledge professionals in the workplace. Indeed, for the knowledge strategist there often no connection with any of the discrete disciplines that make up what we usually think of as the components of the knowledge domain.

These are all important disciplines, but they are primarily about collections, including of course modern digital collections. As one of my colleagues has pointed out, one of the most distinguishing

characteristics of knowledge strategy – the discipline in which the knowledge strategist is employed – is that it is not a collection-based approach to KD/KS. Knowledge strategy – as a discipline – is a *management*-based approach to knowledge development and knowledge sharing. Going even further, another SMR colleague asserts that the information and knowledge strategy approach goes even beyond a management approach to KD/KS, to a cultural or organizational-effectiveness perspective about how to deal with knowledge.

So the knowledge strategist does not necessarily work with collections, although the work of those who do work with discrete disciplines informs the work of the knowledge strategist. And once we get to that level and start thinking about the management- or cultural- or effectiveness-approach to knowledge and knowledge value, we discover something about what corporate and organizational management needs.

While understanding the role and value of these discrete disciplines, what the enterprise really requires is qualified leadership and management staff to pull these – and other – disciplines together, to provide an enterprise-wide approach to KD/KS. In doing so, the knowledge strategists are then positioned to link the corporate knowledge strategy with the organizational business strategy, thus ensuring organizational effectiveness.

It all begins to come together when we think about what knowledge strategy is and why an organization or company needs a knowledge strategy. Indeed, to me knowledge strategy is what I see as the future of knowledge services, and it has a structure, one that's been identified by my SMR colleague Dale Stanley, with three related frameworks:

1. In the discipline of knowledge services (the theoretical, where the people working in the discipline deal with defining – and often teaching about – information management, KM, and strategic learning)
2. In the strategy area (that is, strategy development), with people who will be knowledgeable of the discipline and principles of modern KM and knowledge services and be able to turn knowledge services theory into strategies that are relevant to their organizations.
3. In application and implementation (that is, people who will possess skills in specific techniques and applications for implementing the strategies).

And with this last, we have also identified enabling skills, ways of working that are not necessarily inherent or exclusive to KM/KS but which are, nevertheless, activities we consider “enablers” in helping organizations create and implement their strategies. These are things like change management, KD/KS assessment and measurement and metrics, content portfolio review, and other specific management tools and tactics that help support a knowledge strategy in an organization.

The Knowledge Strategy Opportunity – Ten Steps for You Can Take to Get to Your New Role. If you are interested in moving forward into an emerging and dynamic (and very satisfying) new career – or if you simply want to take on a new role for yourself in the workplace – knowledge strategy is the emerging field you want to think about. You can enhance the work you are doing now and become your organization's knowledge thought leader, or you can think about embarking on a new management career beyond your current work if you consider the following, working in another company as that organization's knowledge strategist. Here's what you can do:

1. Focus on Your Personal and Professional Ambition. First of all, give some thought to how you feel about work, and what kind of interest you have in moving forward in your career. Do you want to work better and work smarter? Do you want to do work that is different from the work you are now doing, and do you want it to bring you some kind of reward that is more than just the usual paycheck? Understand that – as I've tried to point out above – we are all thinking about information, knowledge, and strategic learning in today's workplace. All the time. And we've gone far beyond the days of working

alone in an office or cubicle with other colleagues coming to us when we're *required* to do some work together. We all work together, and the KD/KS concept pretty much defines what we all deal with, on an almost daily basis. And it doesn't matter if the knowledge we develop and share is project focused, research related, or operational, we are all dealing with KD/KS as a regular part of what we do. Certainly at this point in time, Peter F. Drucker's famous term – *the knowledge worker* – naturally comes into the picture. We are almost all of us knowledge workers now, employees Drucker described as the workers who undertake such activities as writing, analyzing, and advising.⁶

2. Define the Problem – Does the Firm Need a Knowledge Thought Leader? What needs to be done, with respect to the way information, knowledge, and strategic learning are managed in the organization? Is there a knowledge culture in place? Are there those “shared beliefs and values about the role of knowledge” we referred to earlier? Do KD/KS activities focus on the larger organization, or are they limited to this or that particular department or functional unit? Is the company a place where collaboration is a given? If you're concerned about information silos, for example, or if you're aware that people working for you are not sharing information and knowledge they should be sharing, the answers to these questions are probably negative. Even so, think about them anyway. You'll need that background as you begin to bring others into your work. And you need those answers as you try to figure out the environment where your knowledge strategy success will flourish.

3. Scope Out the Organization and Learn to Understand “How Things Work”. How do problems get solved in the firm? Again, is the organization a collaborative workplace? Do people work together easily? As you move into your work as a knowledge thought leader, a natural outcome will be a new focus on collaboration, a key element in the KD/KS process made clear in the work of Edward M. Marshall. As Marshall sees it, the collaborative impulse simply builds on its make-up as a principle-based process in which people work together, producing trust, integrity, and what Marshall refers to as “breakthrough results” by building consensus, ownership, and alignment in all aspects of the organization. Put another way, he says, collaboration is the way people naturally want to work, and he even went so far – writing in 1995 – as to suggest that collaboration was “the premier candidate to replace hierarchy as the organizing principle for leading and managing in the 21st century workplace.”⁷ It didn't work out quite that way, of course – nothing is ever quite that simple – but nonetheless, Marshall correctly identified collaboration as an element of organizational success that cannot be ignored and that connects directly with what we are doing with KM/knowledge services. If you want to succeed as a knowledge thought leader, you're going to be highly involved in collaboration.

4. Identify What's Been Done Already and Determine Resource Requirements. If you've determined that there is a need for knowledge leadership at the company where you're employed, you are already aware that there have been situations when some knowledge-related issues were addressed. What happened? How were the problems resolved? Was it a question of a department creating a database that could feasibly be accessed by another department, with both sets of workers benefiting from having the “common” content available? Was the corporate intranet built several years ago and then not further developed, even though enhancements and updates were required? Or, with this latter example, was the intranet issue carefully studied and the enhanced intranet rolled out successfully? In either case, you want to examine how these projects were initiated, how they were paid for, and what levels of involvement – especially cross-functional involvement – were achieved. You also want to identify staff participation, particularly in terms of staff time required. Finally, you will want to connect with some of the people involved, especially people at the management level, to learn about how

⁶ Drucker, Peter F. *Management: Tasks, Responsibilities, Practices*. New York: HarperBusiness, 1993 (originally published 1973).

⁷ Marshall, Edward M. *Transforming the way we work: the power of the collaborative workplace*. New York: American Management Association, 1995.

resources were made available to accomplish goals relating to the innovations undertaken (and to learn about their success or lack of success with the initiatives). As Rosabeth Moss Kanter once put it when she was writing about innovation, you want to look for “exemplary” practices – innovations – that are already occurring in the company, innovations that reflect the new way the leaders “want to operate.” It’s what leaders do. They put innovations in front of people as “tangible models” of what can be done.⁸

5. Make Your Case. Since your role as a knowledge strategist is a leadership role, make sure you understand all the directions and subtle activities you must undertake to make thought leadership a viable (and appreciated) role in the company where you work. It’s not such a far-fetched idea, and once again Kanter – one of the important management leaders of the past several decades – comes through with good advice: leaders put actions behind their words, and they have a vision of where they want to go that’s “well-articulated, communicated wisely, and communicated repeatedly ... everyone has a sense of the destination.”

Once you have your direction, as a knowledge thought leader you recognize – and bring others to recognize – that by giving attention to how the company can develop successful paths for dealing with information and knowledge problems, you are re-organizing and perhaps even re-structuring the organization. And you are doing it in a way that will help move the company to a new state of being. You figure out how to put real resources into KD/KS, and you give people responsibility, setting in place new measures that tell people what the standards are, so they can measure progress toward their goals. And the effort is very carefully not one-sided. As the company’s knowledge strategist, you give feedback to the organization, ensuring that everyone can see when policies, practices, systems, and structures support the new knowledge direction you’ve put forward.

6. Be Prepared to Think Big and Lead Change. It’s all part of the larger KM, knowledge services, knowledge strategy continuum. As such, you are dealing with issues that can only be characterized as “big-picture.” These are important issues, and change is going to be required. Change is a fundamental component of the management function, and it 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 to whom knowledge services are delivered – succeed in their work.

When knowledge is understood to be the organizational asset it is, and when knowledge is exploited (in the positive sense of the term) and the successful implementation of a knowledge services solution leads to institutional success, we are in that desired state of KM/KS. Kenneth J. Hatten and Stephen R. Rosenthal refer to as the “knowing culture” (a slight semantic twist on the more common “knowledge culture”). Hatten and Rosenthal urge individual knowledge workers to “prepare for change by increasing our awareness of what we do or do not know.” In doing so, they become skilled in dealing with the two types of knowledge that enable that preparation: “the knowledge you need to boost your performance when you know your organizational objectives [and] the knowledge that will help you define new objectives and the strategies to pursue them.”⁹

With knowledge services, performance and innovation are uniquely connected, as the organization’s knowledge strategists 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

⁸ Kanter, Rosabeth Moss. *The change masters*. New York: Touchstone, 1985. Also in “A conversation with Rosabeth Moss Kanter about leadership,” by Donna J. Abernathy. *Training & development* 52 (7), July 1998.

⁹ Hatten, Kenneth J., and Stephen R. Rosenthal. *Reaching for the knowledge edge: how the knowing corporation seeks, shares, and uses knowledge for strategic advantage*. New York, NY: Amacom/American Management Association 2001.

side of KM. Managing change in that context was connected, perhaps unwittingly, by Drucker in his *Managing in a Time of Great Change*:

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.¹⁰

It is a difficult and sometimes complicated affair, this “putting knowledge to work.” And certainly stretching the concept into 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.

And we must be careful not to sugarcoat what we are trying to do. 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 (especially in the many pleasant intellectual discussions that will take place), bringing any change into an organization is going to be difficult. Hopefully concepts and ideas like those described here 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 convincing 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 organizational management and knowledge thought leaders truly desire to move to a knowledge culture, and indeed, to lead the process (which they should do), there are specific activities they can undertake:

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 these concepts and specific roles 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....
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 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

¹⁰ Drucker, Peter F. *Managing in a time of great change*. New York, NY: Elsevier, 1997

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 KD/KS 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.¹¹

And from my own experience I add a final piece of change management advice: Listen to everyone. Bring as many people into the conversation as you can deal with. No secrets. No surprises. Listen to folks older and more experienced than you, listen (especially) to those younger and newer to the community in which you all work, and make it a point to listen to everyone in between – their views and suggestions are important (and valid).

7. Conduct a Thorough Assessment. Sometimes referred to as a “knowledge audit” (but never so in a banking or financial organization), this important function will establish the validity of whatever changes will be required to move the organization closer to its goal as a knowledge culture. Whatever information, knowledge, and strategic learning functions are in place will be reviewed and assessed carefully, under the leadership of the knowledge strategist in his or her role as the company’s knowledge thought leader.

From a strictly business-management point of view, the assessment is nothing more than an elementary management application but one that is absolutely basic to successful KM, knowledge services, and knowledge strategy development. It might be described as something along the lines of “the characterization of an organization’s intellectual infrastructure,” and the assessment will often include cataloging and uncovering existing components of that infrastructure but, importantly, it also turns up missing or underutilized intellectual resources.

As a management tool for the knowledge strategist, the knowledge assessment uncovers organizational and personal attitudes about knowledge and the KD/KS role in the company. Additionally, the exercise brings up organizational perceptions about the role of other knowledge-connected activities (KD/KS for research, say, or for innovation – even down to the most mundane knowledge related applications – record keeping for HR, for example, or financial records, or corporate or organizational archives, *etc.*). The knowledge assessment is a valuable foundation or a starting point, and in establishing its essential value for the organization, the knowledge strategist can – as an enterprise-wide knowledge thought leader – ensure that all knowledge workers affiliated with the company understand the importance of KD/KS quality in their work for the company.

¹¹ St. Clair, Guy and Dale R. Stanley. [*Building the knowledge culture: the knowledge services effect*](#). New York: SMR International, 2009.

An additional benefit of the assessment (regardless of the findings) is the opportunity it provides for buy-in from people in the organization for better and more productive KD/KS. Until the assessment is undertaken, most people do not give much thought to how well (or how limited) KD/KS is managed. While most staff members experience information- and knowledge-related problems – sometimes so much so that their “real” work is impeded – they do not necessarily think about how better ways of dealing with these issues can be found. For most, such problems simply “come with the territory.” When a thorough assessment is undertaken – usually involving a wide contingent of staff – it becomes known that the problems and barriers associated with KD/KS are being addressed.

8. Learn Everything You Can About Knowledge Strategy – Then Develop the Strategy. Knowledge strategy development is a critical element in this “10-step” process. As pointed out earlier, there is little purpose in focusing on knowledge initiatives in one or several functional units of the organization if there is no attention to the enterprise-wide value of KD/KS. A knowledge strategy is required to put the enterprise-wide knowledge “big picture” in place, and it is the role of the knowledge strategist to see that the strategy is developed and, when developed, its elements implemented. Direction is required, of course, and the knowledge thought leader does the organization a favor by undertaking a study of knowledge strategy, whether formal or informal.

Early in this employee’s learning, an understanding of knowledge strategy comes into play, with knowledge strategy defined as the management discipline that ensures organizational effectiveness by matching intellectual capital management with the corporate or organizational mission. We like to think of strategy (in general – not just knowledge strategy) “as a combination of (i) the actions that are intended to result in anticipated business outcomes; and (ii) the actions that emerge as a result of the many complex activities that are undertaken within an organization,” the powerful and very useful definition devised by Shawn Callahan.¹² It is a useful approach for going toward knowledge strategy, and combines well with Michael Zack’s description, incorporating corporate knowledge into the larger organizational mission by stating that a knowledge strategy is “an organization’s business strategy that takes into account its intellectual resources and capabilities.”¹³

Thus the knowledge strategist – learning about knowledge strategy – comes back to Drucker, giving us a perspective that establishes knowledge strategy as a management function that:

- looks at both opportunities and results
- supports an enterprise-wide focus on knowledge needs and service-delivery successes for the larger organization
- enables decision-making about knowledge development and knowledge sharing (KD/KS) that balances objectives and needs against possible returns for the larger organization.¹⁴

At the same time, we can give thought to another description of the knowledge strategist, now conveniently acknowledged as the knowledge thought leader who implements knowledge strategy. This knowledge professional’s work is to re-conceptualize, transform, and support new ways of managing intellectual capital as a corporate asset and – as the organization’s knowledge thought leader – to direct the company’s KD/KS, enabling and sustaining an organizational knowledge culture.

¹² Callahan, Shawn. [Crafting a knowledge strategy](#). Melbourne, VIC Australia. Anecdote Pty Ltd [n.d.]

¹³ Zack, Michael F. “[Developing a Knowledge Strategy](#)” *California Management Review*, 41 (3), Spring, 1999

¹⁴ Drucker, Peter F. “Discipline of innovation.” *Leader to leader*. No 9, Summer, 1998.

9. Raise Awareness about the Firm's Knowledge Strategy. As the transition to knowledge strategist moves forward, one of the more pleasant results is the welcome knowledge strategy receives. Not only are organizational staff enabled to work better (and smarter), they are also less subject to frustrating delays in doing their work because of unnecessary information and knowledge impediments. So simply organizing and publishing the strategy is an important part of the awareness-raising effort. Before that happy occurrence takes place, however, there is the initial benefit of raising awareness through the early stages of discussion about the general topic of knowledge strategy and, importantly the attitudes and participation of the many people who will be involved in developing the strategy. As staff and other affiliates come to incorporate KD/KS into their daily work, the whole picture becomes less one of "what's required?" to one of "how will this KD/KS initiative move the organization forward?" Similarly, connecting to the "better" workplace environment is also a collection of typical changes that – over time – have strong influence on how people behave at work. These include the development of a healthy, enabling work environment, a way of thinking about work as less about competition and more about collaboration, and from, as one colleague puts it, a workplace environment that moves from "information power" to "relationship power."

10. Move Your Organization Forward as a Knowledge Culture. By now it should be clear that a well-developed knowledge strategy is the management methodology that will lead toward a better workplace. When these ten steps are realized and you are the knowledge strategist (or one of a group of knowledge strategists) for your organization, benefits – beyond those just mentioned – accrue for the larger organization.

Perhaps it was a colleague, recently sharing with friends the *why* of moving his organization to a knowledge strategy, who said it best:

"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. 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...."

The work of the knowledge strategist is at the forefront of what has to be done to bring about a knowledge culture, not only in your own work but – if we are lucky – in society at large. Knowledge thought leaders are positioned to create an environment in which knowledge management and knowledge services bring practical and tangible benefits to the organization. It's all part of the process of initiating a KD/KS framework supporting a knowledge culture. Moving to this knowledge culture is no small matter but if you will take up the challenge, if you will engage in an effort to transform yourself into a knowledge strategies, your organization – and your career – will be better for it.

And one last piece of advice: resist the temptation to shy away. Heed the words attributed to American architect Daniel Hudson Burnham, the distinguished architect responsible for magnificent city planning designs.

Here's how Burnham inspires us: "Make no small plans. They have no magic to stir men's blood."

Stir your blood, and that of your fellow thought leaders in your workplace. Don't be tempted to "put it off" because there are other "pulls" on your time and energy. This is important. In fact, there are few initiatives you can undertake that will influence your success in your career and lead to that organizational effectiveness we so desperately long for in the organizations where we work. Go forward with your work and bring KM, knowledge services, and knowledge strategy into the workplace. You will make a difference.

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