



[SMR International Briefing](#)
[June, 2010](#)

KNOWLEDGE STRATEGY DEVELOPMENT PROJECT COMPLETED - LESSONS LEARNED

A six-month project to develop a knowledge strategy for an international organization has been completed.

As with similar assignments relating to knowledge strategy, one is left with both a sense of accomplishment that the big job is finished and a certain sense of sadness that the job is no longer the focus of one's professional life. Implementation will move forward, and change – both cultural change and structural change – will be managed with the expectation that organizational effectiveness will be enhanced.

It is a good time for reflection, to think about lessons learned. And what might be shared with other KM/knowledge services professionals.

1. **Establish Clear Terms of Reference.** Before the project begins, it is imperative that all parties agree to a quick summary describing the assignment. If the terms of reference (ToR) are too broad, too cumbersome, or have some other structural flaw that could later hinder or impede progress in the development of organizational knowledge strategy, talk about it before the contract is signed. A typical example: the ToR calls for an electronic survey of identified staff but one attribute of the organization's culture is that no one responds to surveys. In fact, surveys are universally ignored and the response rate can be predicted: it will be zero. Be sure to ask questions about what's been done before, or what works in the organization.
2. **Secure Senior Management Sponsorship.** It doesn't matter which organizational level or functional unit has responsibility for the development of knowledge strategy; if the strategy is expected to have enterprise-wide impact the entire organization must be involved. To make that happen, the active sponsorship of a senior management employee is critical. That person must have the authority to *express* (voice support for the development of knowledge strategy), *model* (identify a particular recommendation proposed in the knowledge strategy and have it implemented in his or her immediate office), and *reinforce* (describe the success of the effort, with the authoritative implication that similar application in other functional units would be wise).
3. **Understand the Framework.** As IT and KM/knowledge services combine (and with many organizations now using KM terminology to describe what until now were prominent elements of the IT construct), a considerable amount of effort will go into establishing that

KM/knowledge services is *not* IT. Be prepared to describe (and perhaps discuss in some detail) that KM/knowledge services is in fact a management methodology powered by knowledge development and knowledge sharing (KD/KS). KM/knowledge services is of course achieved through the utilization of IT but with the recognition that it is the human interface that is the critical element of KM/knowledge services success.

4. **Focus on the Big Picture.** All of which leads to the unchangeable fact that developing knowledge strategy is an activity undertaken by the entire organization, not by a single functional unit or department. If this has not been made clear from the outset, much discussion is going to be required and, in some extreme cases (depending on which internal budget is footing the bill), some re-working of the ToR and contract terms might be necessary.
5. **Recognize that Succinctness is a Virtue.** Regardless of the reputation of the consulting firm or the published writings of the consulting team (a particular issue when academic specialists have been brought on board), no one involved in the knowledge strategy development project is going to sit and read volumes of content. This is business, and much of the knowledge strategy concept – perhaps even its inception – is simply to move things along. None of the team members from the staff have the time or the inclination to read more than they can get away with, and certainly others in the corporation – not involved directly in knowledge strategy development – cannot be expected to spend time reading. Discussions cannot (and will not) be built on regimented discussions of this or that theory as published here or there. Executive summaries, “talking points,” discussion briefings, and all the other trimmed-down management documentation we're so familiar with are the order of the day. If it's not short it won't be read.
6. **Prepare to be Flexible.** The schedule, the players, budgets, staff assignments to the knowledge strategy team, even (in some rare occasions) organizational leadership can all change. Keep cool. If this or that element of the ToR must be re-worked or managed in a slightly – shall we say? – less professional manner than what you're accustomed to (or what you would prefer), just do the best you can. Here's an example: if your team has planned a staff awareness-raising session, to get all staff on board for the strategy development project, and a senior management retreat is suddenly scheduled for that time, fall back on your “workaround” skills. You can figure out how to achieve the same ends with different means.
7. **Expect Total (or as Total as Possible) Involvement.** Related to the above, set up as many opportunities as possible to get people to talking about what you're doing. Don't just limit the process to formal interviews and focus groups. Identify individuals who are interested in KM/knowledge services and cultivate those people – especially younger staff – to come together for informal lunch meetings (does the organization encourage “brown bags”? if so, take full advantage of them to get people talking about knowledge strategy and how a solid knowledge strategy affects the workplace community), discussion groups, after-work gatherings, and the like. Get people to talking about KM/knowledge services and you'll soon find yourself in the middle of a local KM/knowledge services “club.”
8. **Understand Working Styles.** Understand that working styles vary, and it is critical – particularly in an international setting – to be aware that some of that good old American

get-up-and-go is going to be a little off-putting to some workers. Don't be disappointed if some people begin to step back when you invite them to come to a discussion or meeting. Regardless of how interesting the topic might be to them, they have their own understanding about how busy they are or what they can take on. Don't judge. Just go easy and bring along the people you can. The osmosis effect will eventually get everybody involved, even those who can't participate directly in the strategy development project.

9. **Encourage Communities of Practice.** A useful and practical methodology for creating more interaction is the development of CoPs, building on the subject specialties of the people involved. With the knowledge strategy development team's expertise in social networking, CoPs, and similar useful techniques, a quiet word with this or that subject expert can move people into more of a knowledge-sharing framework. Once that happens, it isn't long before many people are sharing knowledge, ideas, and even expertise, simply because they are comfortable with it and it makes their work easier.
10. **Move Outside the Client Organization.** The more broad-based the project focus, the more people will become involved. One way to widen the picture is for you and the knowledge strategy development team to look for opportunities beyond the workplace, situations in which you can share ideas and take up discussions of some of the same KM/knowledge services topics you're using in the project. Are there professional organizations in the local community that would welcome participation from any of you? Do the local universities, civic organizations, and training schools want to learn more about KM/knowledge services? Are businesses or non-profits doing work that will benefit from volunteer participation from you and your colleagues? Take every opportunity to increase and share your own knowledge and you'll be surprised how much of it will slide over into knowledge strategy development.
11. **Lead by Example.** Such functions as strategic learning, succession planning, career development, and the like may or may not be part of corporate management structure in the client organization, but as you speak about KM/knowledge services, you and your expert team are going to find yourselves with many opportunities to advise others in the workplace (especially, again, the young people working at the company). Knowing that you understand the role of knowledge in the workplace, and the value of knowledge sharing to organizational effectiveness, they are going to come to you for advice. Give it. Find the time to talk with them, listen to what they need, and even if you can't respond to specific requests (such as helping them find a new job or figure out where to go for additional training in KM/knowledge services), they'll benefit from speaking with you. And you'll learn much about the less-formal organization of the company, knowledge that you can put to good use as you and your team move on with the knowledge strategy development project.
12. **Develop Enthusiasm.** Understand that, simply because of the nature of your role – and that of other team members in the project – you are in a position to get people excited about KM/knowledge services. Help them understand how the catalytic value of merging information management, knowledge management, and strategic learning adds to workplace success, and their own. Get them to share stories about when a KM/knowledge services idea works (or when it doesn't). Put them in touch with one another, and give them every opportunity to share their intellectual enthusiasm about what they can do in the

future KM/knowledge services workplace. Their enthusiasm will be contagious and you'll soon find yourself surrounded by a cadre of KM/knowledge services enthusiasts – a very pleasant place to be.

Be Proud of Yourself. You're changing people's lives, especially their lives in the workplace. Once the knowledge strategy is in place and implementation begins – and continues – your client's employees are going to work smarter (and work SMART). While the many elements of knowledge strategy development must be your focus (things like identifying the scope of the project, conducting the knowledge audit, identifying knowledge assets – and recommending new knowledge assets – describing the gaps and constraints that must be addressed, developing managerial and structural recommendations), never lose sight of the fact that your team's work will make things better for everybody in the organization. Like what you're doing and be pleased when you've done it.

- Guy St. Clair