



Book Knowledge Management Basics

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ASTD Publications, 2009
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Recommendation

This book is a practical guide for anyone charged with implementing a knowledge management (KM) system. At first glance, some practitioners may think the book is too basic. They may assume that they already know everything, or that all they have to do is replicate what other firms are doing. Other readers may feel so overwhelmed with the task of knowledge management that they will welcome any advice. Business trainer Christee Gabour Atwood’s book can help knowledge management professionals on every level. She stresses the need for a customized system, built largely on the input of the employees who hold most of an organization’s knowledge. This quick, easy read offers insightful suggestions and lists of tips about every step of implementing a KM system. Even if this book serves you only as a review, *BooksInShort* finds that its information is comprehensive. In fact, you could easily convert it to checklists to guide you through the KM process.

Take-Aways

- Managing knowledge means identifying what information to collect, finding it, verifying it, deciding how to organize it and making it accessible.
- To launch a good KM system, have people throughout your company participate in creating, using and supporting it.
- Design your KM system to align with and to serve the goals of your business.
- Your firm’s data include “explicit” documentation and employees’ “tacit” knowledge.
- Initiate your KM efforts by forming a team, conducting a needs assessment, and planning how to collect and store information.
- Identify subject matter experts (SMEs) who can supply and assess data.
- Maintain your KM system by reminding employees how to access it and updating your data.
- Consistently monitor your KM system to see whether your technology needs upgrading.
- The best KM systems are flexible, dynamic and customized for your organization’s culture, processes and practices.
- Establish a “knowledge-sharing culture,” a sense of trust, and a fair reward and recognition process.

Summary

What Is Knowledge Management?

Knowledge management (KM) is a dynamic system that companies use to identify important information, collect it from those who possess it, store it and share it with others. Companies use such information to improve their processes, customer relations, decision making, employee morale, performance, profits and, in some cases, regulatory compliance. A good knowledge management system will enable you to consolidate your firm’s internal expertise and to garner as much useful information as possible, such as the knowledge of retiring employees. Follow these 10 basic rules to implement a comprehensive KM system:

Rule One: KM “Must Address...People, Process and Technology”

Everyone in a company should share his or her knowledge with the organization. To make this possible, the company must have a system for organizing and storing data for easy retrieval and use. And the firm must set procedures to maintain the system. For leadership in marshalling the right procedures, personnel and equipment, turn to the person who heads learning for your organization or employ a professional KM system administrator. Create a development team that includes employees from all areas of your company, from information technology experts to departmental representatives. Then, follow five overall steps to implement your firm's KM system:

1. **“Determine the organization’s needs”** – Decide what information will benefit your business most. Relevant knowledge can come from data about customers, strategies and vendors, or from any documentation of an ongoing process.
2. **“Locate knowledge sources”** – Find the most important, current information to capture.
3. **“Choose systems to gather and house information”** – Your firm must decide on optimal methods for collating and storing data for easy retrieval and use. Knowledge and learning experts should determine the best way to “validate” information, and to “organize it and store it so that it is accessible to those who need it.” Your KM processes can also help you collect any data required by law.
4. **“Compile, confirm and circulate knowledge”** – Review, format, verify and revise information before making it available.
5. **“Maintain the knowledge system”** – Knowledge is dynamic. It is constantly changing. Set long-term update and maintenance procedures to stay abreast of any modifications.

Rule Two: KM “Systems Must Engage Every Department”

A knowledge management system should involve each unit in your organization so it draws widespread usage and support. If you standardize your documents and processes, you can train employees, build their performance faster and draw from employee knowledge across departments. Getting top leaders on board early is pivotal. To further engage everyone in your firm, your KM system should feature:

- Carefully delineated roles and responsibilities for every member of the KM team, including departmental participants.
- Online groups and other “gathering places” where employees from throughout the organization can exchange know-how.
- Reward and recognition processes that foster “cultures of knowledge sharing.”

Rule Three: “Conduct a Needs Assessment”

Begin by defining “the goals, scope and requirements of any knowledge management activities your company is considering.” Experts often refer to this needs assessment phase of KM implementation as a “knowledge audit.” To collect information during this phase, use surveys, questionnaires and interviews. You may uncover challenges the firm needs to address to enrich its KM system. Gather data according to employee groupings that make sense for your company: by areas, teams, departments or work units. This will ensure that your information is relevant. Start small. Make a pilot or “preview” KM system with just one group to work out any kinks and to refine successful strategies for the rest of the organization. A knowledge audit takes a lot of time, but the results can tell you what your workers need, what processes already work well, where knowledge functions overlap, where information is lodged and how people now obtain it.

Rule Four: “Identify Existing Formal and Informal Knowledge Sources”

Sometimes information is “explicit,” that is, easy to find or already formally documented. But other important information may be “tacit” knowledge, in the form of employees’ unwritten expertise or personal documentation. This information might concern their jobs, processes, rules, philosophies or the firm itself. Identify subject matter experts (SMEs), because they possess a lot of your company’s tacit knowledge. They could be employees, but they might even be customers or vendors. They understand what information is helpful and they are willing to share what they know. Some employees may hesitate to share data due to insecurity, fear or policy concerns. Establish a “knowledge-sharing culture,” a sense of trust, and a fair reward and recognition process to help ensure that people will contribute to your KM system.

Rule Five: Your KM System Should Achieve Results and Fit Your Culture

Organizational knowledge managers should structure their systems based on “desired results and on the company’s and expertise.” Once you collect information, evaluate it to make sure it will be useful. Have your team members review it for completeness, utility and format. To facilitate collecting information in the future, standardize your data collection processes by creating templates. This will enable contributors to document their data uniformly and easily. Align your collection process with your programs, technology and procedures, like training initiatives or personnel evaluations. Use these tools to standardize and capture data:

- **“After-action reviews”** – Employees discuss and evaluate the results and success of a project or process improvement.
- **“Best-practice sessions”** – Participants share what they know about the most effective ways to complete their work.
- **“Communities of practice”** – In these networks, staffers exchange information and bond with each other.
- **“Blogs”** – Individuals engaged in the KM process can add their comments online.
- **“Narrative databases”** – These databanks allow people to store information in anecdotal form, including audio and video files and written documentation.
- **“Online training”** – This adds flexible accessibility to training programs.
- **“Mobile training”** – Make material available through mobile devices such as cellphones and PDAs (personal digital assistants).
- **“Peer assists”** – This is where workers with particular skills (within or outside the organization) can teach their expertise to others.
- **“Wikis”** – Users can share and edit content online.
- **“Yellow pages”** – Service providers can advertise their expertise.

“Managing knowledge is identifying useful knowledge that exists in the organization and making it available to others to use or build on.”

Every KM system needs to include a “portal” that gives users a single, orderly entry point. Software designed for KM often includes such gateways, as well as tracking functions to measure usage, and mechanisms that enable you to “collect and connect” new information.

Rule Six: Exchange Knowledge and Resolve Inconsistencies

As you gather information, continually improve your collection process. Always keep your organization's goals in mind. Determine who will use the information and in what situations. Design, test and standardize templates that are easy to use. Decide if you will share files electronically, and by what method, or opt for another medium. Create guidelines for compiling information and remind participants to avoid documenting sensitive information. Verify all information before making it public in the KM system. Send templates and other documents to SMEs to review and revise for accuracy, relevance, completeness and timeliness. Solicit the final word from higher-ups if SMEs disagree. Decide on the final content and format before posting it.

“A KM system should be organizationwide, both in its contributors and in its users.”

Put a plan in place to announce the inception of the KM system and, going forward, to announce any updates. Consider your timing and budget constraints for rolling out and marketing the new KM system. Create a team of pilot users to identify the system's best features and compile success stories from throughout the organization. Design a logo and compile a marketing campaign, including a kick-off event. Write articles about the new system. Offer training. Think about how you will capture new knowledge going forward. Over time, you will document, review, evaluate, store, share and update this information as part of your KM system.

Rule Seven: Update, Revise and Build Your Database

Once your KM system is set up, assemble a plan for maintaining the information so your database remains “valid.” Regularly evaluate your KM system, and make improvements that address any concerns from these evaluations or from employees' suggestions. Some organizations designate an executive, like a Chief Knowledge Officer (CKO), to be responsible for the system. Otherwise, the responsibility may reside with an individual or a team. Follow-up activities may include:

- Email reminders that the system is up or updated.
- Newsletter articles related to KM.
- Lists of challenges or benefits.
- Answers to frequently asked questions (FAQs).
- Training sessions on using or maintaining the system.

Rule Eight: “Encourage...Sharing, Cooperation and Continual Growth”

When you implement your KM system, carefully consider how to store and access data. Design your system to permit easy entry so employees can access information quickly. Investigate whether or not you need to upgrade your software to reach your firm's KM goals. Some companies purchase specific software packages designed for managing knowledge. Conduct research online, ask knowledge managers at other corporations what they use, interview vendors and discuss your setup with employees who will use the system. Consult information technology (IT) staff members to figure out what will work with your network and what resources you can draw on from inside or outside your firm. Evaluate your resources and tools, then present that information and gather feedback. Decide how to roll out the KM system for your company's employees.

Rule Nine: “No...System Will Work for Every Organization”

To support the implementation of your KM system, acknowledge and reward involved employees. Schedule KM demonstrations and activities at company gatherings or events. In your publicity for these activities, emphasize the people who contributed to the project. For management purposes, create a database of information about project contributors. Include contacts and recommendations. Leverage technology, such as networking websites, to create groups whose members can share material and ideas. You can still accomplish a lot with traditional, low-tech methods by making the most of meetings and bulletin boards where group members can share information about the KM system.

“Knowledge sharing is not a precise business – it's messy.”

As your system comes up to speed, monitor your progress and be willing to modify each step along the way as you tailor your KM processes and policies to fit your firm.

Rule 10: Communicate “Existing Knowledge”

“Ultimately, knowledge management isn't an exercise in managing. It's all about communicating the existing knowledge and expertise so that others can continue to build on that knowledge.” In the future, keeping your KM systems flexible and healthy will be even more important. Over time, expect to improve your work processes and to use your records in different ways to keep up with your organization's needs. Share information. Ask customers for feedback. Mentor new staffers who are learning to use your KM system. Keep your data current and accessible to improve the sharing process. Most of the knowledge in your system has always existed in your organization, but now you can use and maintain it systematically.

About the Author

Christee Gabour Atwood is a speaker, trainer and knowledge management adviser.
