SHARING EXPERTISE IN PRACTICE: THE WAY FORWARD FOR KNOWLEDGE MANAGEMENT

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Different types of organisation require different approaches to knowledge management. After describing the possible approaches and their relative effectiveness in the corporate environment, the paper emphasises the importance of sharing information and suggests ways in which this can be achieved.

There are a number of approaches to knowledge management. These include organisation and storage, controls, dissemination, discussion, communication, signposting, mapping and collaboration. Each approach has advantages and disadvantages, depending on what the enterprise wishes to achieve. It is important to choose the correct techniques because the effect of choosing the wrong one may be to lock up the organisation's knowledge and stultify it, rather than to use it to help the body thrive. This paper identifies organisational characteristics which suit specific knowledge management styles, and looks at ways to put them into practice.

Approaches to knowledge management

Techniques of organisation and storage aim to capture knowledge so that it can be readily found. This method frequently involves seeking out material and identifying best practice and transaction records. It builds benchmarks and comparisons. Material is fitted into a classification structure. These techniques work well where there is extensive repeat business. By building a common approach, they suit the needs of a wide-ranging workforce, or one where there are high numbers of people. Where work teams shift and are re-formed regularly, such as in management consultancies or auditors, or where there is substantial staff turnover, people can immediately become effective. The method also suits slow-moving sectors and apprentice or trainee cultures, where work is founded on authority and precedent. These organisations make decisions based on their understanding of the past, and development is evolutionary.

Controls suit regulated industries and practices, and legal information, such as finance, accountancy and pharmaceuticals. Sectors associated with process controls, distribution or franchises are dependent on logistics and have controls built into their
knowledge systems. The same applies to engineering and transport with their use of standards.

The ability to disseminate knowledge is an important element in organisations with broad remits and public interfaces, especially government bodies. When combined with targeting, dissemination is essential for publishing, advertising, and the customer-oriented sectors, such as specialist retailing and special interest groups. In sectors like stockbroking, financial trading and news-based activities, e.g. the media or insurance, where there are constant updates and a need to monitor activity, with the emphasis on current awareness, dissemination is crucial to success.

Most people work by gaining information through discussion. They consult and talk with the most convenient person who, they think, knows about the subject. Discussions lead to consensus and pooling expertise. It is an approach suited to small groups and small organisations, collaborative groups and virtual communities, like academics. It is used in political arenas and on company boards. It suits fast-moving sectors, the hi-tech industries, creative sectors and complex, fluid undertakings where the latest information is more important than past experience.

Facilitating communication is important where organisations operate in fast-moving situations, particularly, where change is discontinuous, and there is a need for rapid regrouping, as is the case in leading edge organisations and new ventures.

Signposting tells people where to go to find things out, and where the appropriate information should be used. It is based on advice, guidance and health warnings and is found in teaching, learning and research environments, developing organisations, and bodies which are refocussing, for example, after mergers or buyouts. Thus, signposting is useful where people need lots of information quickly, such as when entering new markets, in evolving economies and non-traditional infrastructures. The spread of Internet and intranet access has led to an increase in signposting. It is not a static activity, as constant amendment is needed. It is also a two-way process, not only pointing outward from the organisation but directing information from key sources towards the enterprise which needs it.

Information mapping is a well established process. It is important to avoid developing records which are out of date. The emphasis is on location of key expertise, and plotting directions and lines of communication, links and trade routes. Mapping is important where key knowledge lies outside the direct control of the organisation which needs it, for example, where there is shared resourcing using union catalogues. Mapping is useful in export intensive sectors, market sensitive industries, supply chains and where there are supply-demand relationships. It supports opportunists and fast moving entrepreneurs.

The collaboration model of information management combines expertise for common good and is a feature of interchanging work processes which include: electronic commerce; mail order; financial transactions; accountancy, and supply chains with inventory and stock control. Collaboration has become popular for relationship building and locking customers in.

In order to summarise the significance of the different types of knowledge management, it is important to be clear what is good or bad for the body in question. Organisation and storage, record keeping and best practice are good for adherence to procedures, streamlining processes and reducing overheads. Communication and mapping help fast-moving organisations without weighing them down. Organisations may be at one end of the scale or the other. If they are somewhere in between, be sure that there is a good focus on what needs updating, and how to facilitate communication. The aim is to develop the intellectual capital of the organisation, so it meets all its obligations and operates effectively.

Sharing expertise

Once it is clear which type of knowledge management is appropriate, there are various practical methods for sharing experience. These may come from the people holding and shaping the information, from organisation and control, from set goals and objectives, out of processes and procedures, through opening up resources, out of quality procedures, or through organisational culture.
A problem with taking the people approach is that the experts, who hold essential knowledge, have little time for sharing it. By setting others alongside them, it is possible to extract information through interviews and digests. For critical areas of knowledge, experts can be assigned, and approached when there are significant events. In addition, information workers can join transaction, engagement and client teams, attend their review meetings, monitor activity, and attend meetings with customers.

The organisation and control approaches mean setting up infrastructures and using them to extract significant information through these. This method is commonly relies on management information systems (MIS) and information technology (IT), with benchmarks used to assess the value of the material. IT structure can classify and route the information, increasingly in conjunction with Internet and intranet links. To extract useful knowledge, databases linked to the infrastructure must be designed to facilitate information retrieval and packaging, rather than mere storage. The content may include product related knowledge, the organisation's views and decisions on key issues, vital information required for processes or product development, templates, standard documents or fragments, standards and procedures.

The goal or objective driven approach is important in most contexts. This works through identifying what is important for the business or operational need, and the areas of knowledge best supporting this. The next step specifies the requirements for that knowledge, such as comprehensiveness, currency or cost, and sets priorities. These issues are important because it is impossible to maintain all information equally. What needs keeping up to date? What can be handled automatically? What needs attention and what are the consequences, if this is not dealt with? Who uses the information? Who is accountable for its reliability? How much is driven from a procedures manual? What material needs special consideration, and what would trigger this, e.g. a cyclical event?

Where objectives are common to many organisations, collaboration with outside bodies may be appropriate, for example trade associations, trade alliances and partnerships, where responsibilities may be shared. There may be an adverse trade-off of loss of direct expertise in this approach. Goals may also be shared with clients and customers. Collaboration is a growing trend. It is important to structure information resources with this in mind. It may be necessary to separate out common items from internally sensitive material. Having too much of an internal focus in data structure can lock out these opportunities, or make it hard to identify material which can be shared to mutual advantage.

One of the easiest ways to improve knowledge sharing is to capture information directly from processes and procedures, notably from the work product. Certain types of documents are useful, especially extracts from summaries and minutes because key information can be digested from these and disseminated. Properly structured document management systems can assist. As documents are produced, they can be identified by type or subject, and classified. Workgroup software and workflow systems may form foundations for knowledge systems, in which product or transaction data are captured at key points in the process, for example, when the transaction or operation begins or ends, or a process changes. Information may be transferred in order to update indexes of expertise. Links to customer records, invoices and sales reports can provide management information in the form of usage patterns, accounting and management reports, analysis and market needs. If it is appropriate to share the data, this output may reveal that other people in the organisation are working in similar areas.

Contact information can be updated from word-processing files, with suitable validation procedures, and used to maintain records of who knows whom. Although organisations do keep this information, it is often not in a common format, so is grossly under-used. Loyalty cards, staff or membership numbers and incentive schemes can be used to generate more knowledge. If, for example, one piece of information is requested, is other related material also of interest, and should the user be informed of later developments? Process and procedure information can be used to keep people informed of new events, new technology opportunities, new recruits and new ventures. If structured as
Whenever people discuss knowledge management, the question of culture is deemed paramount. The right culture facilitates the process. An adverse environment makes the task virtually impossible. Yet it is by no means easy to create the right culture for knowledge sharing, and to wait for the ideal can mean that no progress is made.

Recognising the appropriate style of knowledge management for the organisation is the key. If this is done correctly, it should be possible to introduce effective, knowledge-sharing activities, without contravening the organisation's basic culture. Clearly, it is easier to work towards a knowledge culture, if a top down approach can be taken. In practice a middle down or a middle down / up approach is often more attainable and effective.

Champions are invaluable, if they can be found. Cultural solutions include rewarding people for sharing and limiting their opportunities, if they do not contribute to the organisation's intellectual capital. Assigning accountability reinforces this, by, for example, holding people responsible for time wasted or acknowledging their contribution to success through the effective transmission of expertise. Culture can also play a significant role in determining whether information resources are allowed to develop piecemeal without advice or notification, or whether they are properly managed and exploited.

It is commonly acknowledged that it is not easy to develop good, shared knowledge resources. Identifying what is important and choosing the best methods require careful thought and understanding of what is genuinely valuable and realistic. This paper has highlighted some of the differences between the various methods and their significance. Finally, it should be remembered that as organisations evolve, their knowledge management techniques must be reviewed, to make sure that they continue to underpin the enterprise's strategy.