Making Knowledge Visible: A DIY guide to knowledge management for every manager – Part 1

By Patrick Lambe

Most KM projects are top-down, infrastructure driven. They buy lots of confusing technology, then employ specialists to do all the heavy work for you, and then these specialists go round (a) trying to get you to dump your knowledge assets into their portals, and (b) trying to get you to collaborate with total strangers. Ever wondered why KM projects so rarely meet with stunning success?

If you are a manager, knowledge is your business. But it's a bit like breathing. Until we start having asthma, going into labour, or trying to do yoga, we don't really think about our breathing. We just do it. And in management, we field, find and use knowledge every second of every working day. Until we start having problems with knowledge in our work – and boy do we have problems. There's so much of it awash in our offices, computers and networks that we are lost in the flood. It comes at us mediated by multiple technologies: TV, radio, newspaper, professional literature, internet, emails (attachments!), SMS, phone calls, conversations, letters, faxes, reports, presentations, seminars. We're in a constant technological toy-juggling frenzy.

If you think you're attending more meetings than you were five or ten years ago, knowledge is the problem. It's the best way we know how to spread it around and get sensible decisions made from it, but it's expensive and isolates us even more from the technologically mediated knowledge around us. Let's face it, the more that technology enables KM, the worse we get at managing it. Talk about re-inventing the wheel. The guy at the next desk might very well have given in to pressure from the Knowledge Manager and posted his project review on the corporate intranet, but you'll never bother to look, and you'll never bother to have a conversation over a cup of coffee, and so you'll simply re-invent the wheel again, when it's your turn to do a similar project.

So, just as in asthma attacks, going into labour and doing yoga, the first, critical step in getting control of our knowledge again, is to become more aware of the knowledge we need and use. Forget the specialists (you'll start discovering when you try the activities below how to use specialists more as a help than a hindrance). Your knowledge problems will only be solved when you take charge of your own KM within your own job. This article provides a short series of steps you can take to become more knowledge-aware, so that you can start making some sensible decisions and – I hope – it will make your working life easier.

1. The Audit

All good knowledge managers do an audit when they start work. The audit starts with the strategic objectives of their organization, looks at the types and sources of knowledge required to best resource those objectives, and works out which ones are available, which ones are missing, which are being used, and which ones are not being used. A knowledge audit will identify:

Issue	Response
• Lack of necessary knowledge to do job effectively	• Source knowledge and supply gaps
• Lack of awareness that knowledge is available elsewhere in the organization	• Inform, ensure awareness is current, introduce people!
• Inability to keep up with changes	• Train
• Significant duplication of efforts	• Maintain an easily searchable projects/lessons learned database, issue bulletins on new additions
• Not knowing where to find relevant expertise	• Build directories of experts searchable by topic

How do you do your own knowledge audit? Here's a half-day activity that will help your team become more aware of its knowledge use, its knowledge needs, and enable it to take more control over its knowledge resources.

Gather your departmental/divisional team. It doesn't matter if it's only your immediate team, the critical thing is that everybody is present, from team leader down to lowliest clerk.

Step 1 – Your current knowledge habits
Brainstorm as a group to a board (on post-it notes) all the items/sources of knowledge that you commonly use (files, archives, internet, directories, documents, reports, internal/experts, each other). If you find yourself checking things a lot with a particular person, label them as an "expert" as far as your knowledge use is concerned. Be specific. Write the names of people, the specific names of files, documents, reference resources. Against each one write down what you use them for – one or two examples is enough. It gives the knowledge items you have recalled a specific context. The big problem with "seeing" knowledge is that we think knowledge is abstract until we think of a particular scenario when we use it.

Next, use an affinity diagram exercise to cluster all the related knowledge sources together. In an affinity diagram exercise, participants are silent, everybody takes part, and you cluster related items on post-it notes as intuitively as you can. Don't discuss reasons, if somebody wants an item in a different group from you, write a duplicate post-it and give it to them. Once you are all satisfied, brainstorm as a team the best, most intuitive names for each group of knowledge objects. Try to avoid using existing organizational names, categories. The point is for you to get a fresh look at your knowledge habits, not to classify them in hierarchical, secondhand ways.

Step 2 – Your strategic knowledge needs
Put your brainstormed lists aside… you'll come back to them later. Now you need to sit down as a team and write down collectively what your team's strategic objectives for this year are. What is your team function, what are its goals, and how does it feed into the next higher level of business objectives? For example, in the next six months

you'll be focussing on the new product launch, or you are going for People Developer status. Write your team's objectives and goals in the centre of a large sheet of paper or a whiteboard.

Now make a new list, this time a mindmap of the knowledge resources that you imagine (in the ideal world) that would be useful/necessary for you to achieve your goals and perform effectively. Be specific! Make sure that every objective, function and goal in your deprtment's strategic plan has lines connecting it to an idealised knowledge resource. It doesn't matter if something is already available and you are using it. If it's necessary for the work of the team, write it down anyway.

Step 3 – Your personal knowledge needs
This exercise is very similar to the previous one, but it is done privately against your own personal job functions, goals and objectives. It should include any personal development plans you have. Build a map in the same way as in Step 2 this time focussing on your personal needs.

Step 4 – Identifying issues
Again as a group, brainstorm all the incidents when you were unable to find knowledge or information that you needed, when you needed it. What was the knowledge item concerned? Was it a matter of time, ignorance, skill, availability? Identify the specific issue. If anybody raises an issue, write it down. You may discover that something they thought was unavailable was in fact there to be used. Your first KM victory! But record it, it demonstrates a knowledge awareness gap you'll need to deal with.

Step 5 – Integrating the audit
This is another affinity diagram exercise. Return to your first affinity diagram and go through each of steps 2, 3, and 4. Take each *new* piece of knowledge from these lists and *add the items from each stage in a new colour* to your original categorized affinity diagram. Remember, you built your own classification in your affinity diagram exercise (Step 1). What you have is a knowledge structure that is built according to your team's current knowledge use patterns (hence minimal change to your habits required). Now through using different colours, you will be able to identify the items you frequently use, the items that you don't use currently, but which are necessary for your team's and your personal work, and the items that your team members have already discovered are missing.

Your final step is to prioritize the missing elements, and try to come to some conclusions and a plan for getting the missing resources that you think you need. If you have a knowledge manager, this is where they'll come in handy – now is the time to use them! Meanwhile, your entire team now has a heightened collective awareness of the knowledge assets that they need and use, directly related to their jobs. Next we'll look at how you can get to see knowledge *flows* within your organization.

2. The Map

In the first part of this article, you looked essentially at knowledge resources – including people. In a knowledge *mapping* activity, you are looking at how easily knowledge moves around between people in an organization. You'll discover some interesting facts, and have a good shot at enhancing knowledge-sharing and collaboration – again, all in the service of your main work objectives!

You can do this activity in three stages: individuals complete a worksheet, somebody collates them into a map, then you all get together for a couple of hours to decide what to do with the map.

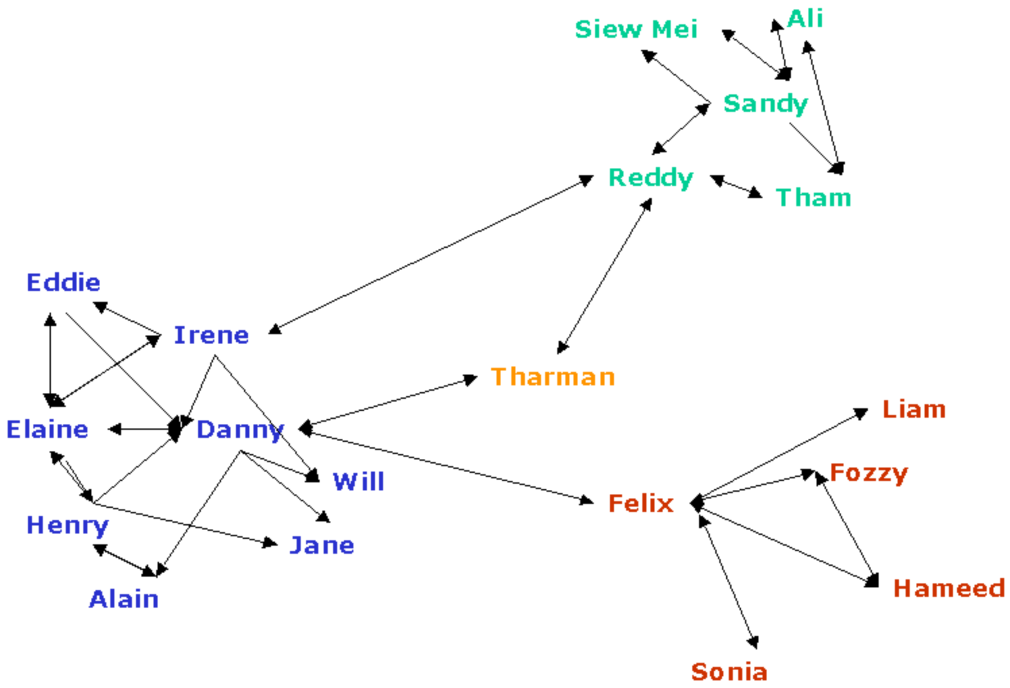
Step 1 – Who do you talk to?
Again, this works best if everybody in your department is involved. The more people who take part, the better it works.

Each person privately makes a list of names of all the people they regularly communicate with for work within the organization. The communication should be primarily giving or receiving information and knowledge, but it can include informal communications as well. The relationship should be either positive or neutral, not negative. If the person whose name you've written is in a different department, give their department as well. Do NOT write down a list of the people you are *supposed* to be communicating with, only the names of people you *actually* communicate with, on a regular basis.

Step 2 – Draw the map
Nominate one team member as mapmaker to collect all the individual lists. It's important that the author's name is at the top of each list.

The mapmaker now transfers all the names to one single map. If Elaine has Alain on her list, draw a line between Elaine and Alain, with an arrow from Elaine to Alain to show she listed him. If Alain mentions Elaine as well, draw another arrow on the line to show the exchange is two-way. Wherever somebody mentions somebody else, draw a line and/or an arrow. To make your analysis easier, place people from other teams and departments around the edges of your map, and colour code them, so you can recognise the "outsiders" – these are important.

Your mapmaker's first attempt will be pretty untidy. She'll need to make a couple of drafts before it starts making sense. What you'll probably end up within a large group are several clusters or "islands" with a few people forming bridges or connectors between the islands. "Islands" are often team-based.



Step 3 – The Analysis
In this knowledge map, you can identify two interesting types of knowledge connectors. Within the blue "island" for example, you can see that Danny and Elaine are commonly used resources. However the more interesting connectors from a knowledge sharing point of view are those that bridge gaps between different clusters. Within a small social group like a team, you all pretty much have access to the same information resources. Having access to other social groups means you also get access to more information resources, and the connectors are the type who are likely to help you find them. In this map, Danny, Felix, Tharman, Irene and Reddy are true connectors.

What's more you can improve the quality of knowledge sharing generally if you introduce connectors to each other. You'll notice that Felix only knows Danny in this map. He could get access to the resources that Tharman and the green group bring, if you introduced him to both Tharman and Reddy, for example.

It's good to be a connector. Connectors tend to get access to more knowledge, and they tend to be given higher status in social groups. People listen to connectors, they've got something useful to say, and they can always point you in the right direction when you're in a fix.

How can you become a connector? The trick here is to become aware of what other people's knowledge needs are, and then keeping your eyes open on their behalf, particularly outside your immediate team. Connectors do people "knowledge favours", so in return they are kept in the loop by the people they help.

BP's knowledge management team developed a useful "dating game" activity to help individuals become more engaged in sharing knowledge. Let's say you have a divisional gathering. Before you go, get a sticky label and write on it in green at the top, an achievement or an expertise that you are proud of, and that you think might be useful to other people. At the bottom, in red, write down some expertise that you need, to do your job, or that you think might be useful to your team. Put the label on your chest and mingle! Sooner or later you'll spot somebody whom you can help with your expertise, or who has something that would be useful to you. Stop and chat – if this person is not in your immediate team, you are now a connector! Even if you don't have an immediate synergy, you now know something about the knowledge work of another team.

If you're not into dating games, then you can do this at a much more informal and yet consistent level. You'll know who your connectors are in your team from your knowledge map. Get them to introduce you to other people outside your group. Socialise outside the group, and always have two things at the back of your mind to bring into the conversation: how can you help others with your team's knowledge, and how can they help you? Curiosity, friendliness and the willingness to cooperate. Not that difficult if it's related to your team's job needs.

Conclusion

Knowledge Management can often seem daunting, technical and abstract. It can be seen as intrusive if it's imposed from above with an implicit assumption that you're not already managing a lot of knowledge. But in the end, it's all about doing your job effectively by having easy access to the right knowledge resources, and good channels of communication within and between teams. So start with your job and your team, and see what you can get done before the Knowledge Manager gets there.

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