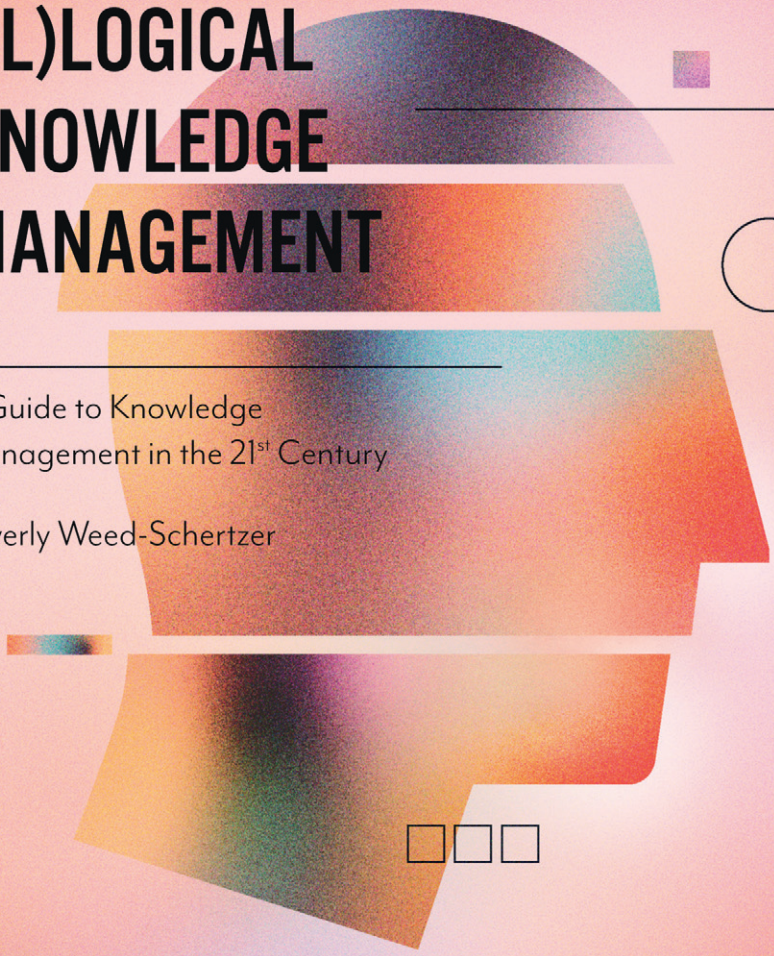
(IL)LOGICAL KNOWLEDGE MANAGEMENT

A Guide to Knowledge Management in the 21st Century

Beverly Weed-Schertzer



EMERALD POINTS

(IL)LOGICAL KNOWLEDGE MANAGEMENT

This page intentionally left blank

(IL)LOGICAL KNOWLEDGE MANAGEMENT: A GUIDE TO KNOWLEDGE MANAGEMENT IN THE 21ST CENTURY

BY

BEVERLY WEED-SCHERTZER

United Kingdom – North America – Japan – India
Malaysia – China

Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2020

Copyright © 2020 Emerald Publishing Limited

Reprints and permissions service
Contact: permissions@emeraldinsight.com

No part of this book may be reproduced, stored in a retrieval system, transmitted in any form or by any means electronic, mechanical, photocopying, recording or otherwise without either the prior written permission of the publisher or a licence permitting restricted copying issued in the UK by The Copyright Licensing Agency and in the USA by The Copyright Clearance Center. Any opinions expressed in the chapters are those of the authors. Whilst Emerald makes every effort to ensure the quality and accuracy of its content, Emerald makes no representation implied or otherwise, as to the chapters' suitability and application and disclaims any warranties, express or implied, to their use.

British Library Cataloguing in Publication Data
A catalogue record for this book is available from the British Library

ISBN: 978-1-83867-806-7 (Print)
ISBN: 978-1-83867-803-6 (Online)
ISBN: 978-1-83867-805-0 (Epub)

ISOQAR certified Management System, awarded to Emerald for adherence to Environmental standard ISO 14001:2004.

Certificate Number 1985
ISO 14001

INVESTOR IN PEOPLE

CONTENTS

LIST OF FIGURES

This page intentionally left blank

LIST OF TABLES

This page intentionally left blank

ABOUT THE AUTHOR

Beverly is the author of *Delivering ITSM For Business Maturity: A Practical Framework* and a high-performing business technology leader. She is an IT Business Strategist that specializes in information technology service management (ITSM), knowledge management, and business strategies for technology environments. She currently works as an independent consultant, where she provides strategic business and technology management education and consultancy. Beverly has led multiple implementations of knowledge management and ITSM in a variety of industries, such as finance, healthcare, professional services, insurance, and manufacturing.

Beverly's experience includes information and knowledge management, service management, IT governance, organizational transformation, and quality assurance practices. She has a knack for integrating information and people with technology.

Beverly's career in IT started with beta software testing and support. Service Operations is her home in IT. She has a passion for technology and focuses on the valuable ways to balance life in the modern world. Beverly is the Founder of edifyIT, LLC, a company she began in 2009, which provides Business and Technology Management education and training.

Beverly also has a passion for yoga and is an Experienced Yoga Teacher (E-RYT). Yoga is a big part of her self-care system and she has blended a regular yoga practice into her busy corporate life. It's given her a perfect blend of a life–work balance that's helped her manage modern-day stress.

PREFACE

Knowledge management encompasses a broad scope of topics concentrated on a core set of information. Businesses are accustomed to handling and managing the information it generates through systems, interactions with customers, through product development, planning, etc. Knowledge is made up of the human elements to information. The human element gives form and context to data and as a practice business collects knowledge with a resolve to distribute and with anticipation people will share between departments.

Information as a tenant of knowledge is relative to a specific topic and its advanced with details about the topic from a person's experience, learning, and understanding. This is one example of how knowledge comes to be. The idea is to advance information to a state where it represents a comprehensive narrative about the subject. Knowledge combined with human insight, known as tacit knowledge, is often referred to as wisdom. We interchange the use of knowledge and wisdom very closely as if they are the same, but they are not.

Wisdom is a presence and knowledge are an entity, an asset.

For the purposes of this book, our focus is entirely on understanding knowledge based on two perspectives: logical

and illogical knowledge and achieving good knowledge management practices using modern technology. It isn't as simple as it may seem, and designing a good infrastructure for knowledge systems is one small part. There are many complex areas to consider while creating a knowledge strategy. One area is the knowledge sandpit.

There is a hidden sandpit within knowledge management? The sandpit is how I describe excessive amounts of information being passed off as knowledge. Information comes from data we collect; however, it's not all eligible to be considered knowledge. Knowledge should align to certain conditions associated to a topic. Let's say you have information that meets the criteria at hand, and it's formally approved as useable knowledge. Approach filtering carefully because the context of the content may be illogical (not ideal). Just because content becomes part of a community knowledge repository doesn't mean it's logical (ideal). There is a major problem with unfounded knowledge being passed off as factual and logical knowledge. Illogical knowledge doesn't have a place in business and it can invoke ominous situations when people use or follow illogical knowledge. To avoid a sand trap, rational thinking in businesses managing knowledge is needed today more than ever before.

Knowledge is found everywhere in our advancing world of technology. Technology should be making things easier and in some capacity it is; however, we are a long way away from learning how to balance the use of technology where is deemed helpful. We are in a pivotal time to provide better education on integrating technology and people for usefulness, value, and effectiveness. Notice, I'm not including efficiency. Efficiency doesn't belong here, and being efficient is only meaningful when the task or situation needs it.

The considerable amount of illogical knowledge being used and the refrainment of integrating people and technology in a

balanced way is a major motivating factor to why I'm writing this book. In today's world, the twenty-first century, it's really important to help bring awareness and understanding on effecting knowledge management successfully. Better understanding and awareness will help increase the value knowledge will bring to your business community. There is a significant difference between illogical and logical knowledge, and I believe investing in a plan to produce logical knowledge is a vital factor for the plan to succeed. It's important to zone content by logical (ideal) and illogical (not ideal). Illogical knowledge carries extra costs and wasted time because of its unfounded sources or because of unreasonable conditions on how the content is considered to be knowledge.

Another reason I'm writing this book on Knowledge is because of its area of interest personally. I wrote a paper in college on self-knowledge and the older (wiser me) wishes to have this paper today. Knowledge is so prevalent in today's world and has massive amounts of tenants to it. Knowledge and service management are major areas of experience in my Information Technology (IT) career. I write this book from this experience and insight.

Knowledge management is a blend of various commodities, and effecting knowledge management is a valuable business asset. It supports communities of interest and can be a time saver when done properly. To do knowledge properly involves comprehensive understanding of knowledge management and use of a distinct strategy to put it in place.

Sharing knowledge in responsible and logical ways is the motivation behind this book. It's something I exercise in business and personal life. When it comes to knowledge, just be open to other possibilities outside of its scientific models and processes to manage it. This book is instrumental to enduring the complexities of managing knowledge in the twenty-first century!

This page intentionally left blank

ACKNOWLEDGMENTS

This project wouldn't have been possible without the opportunities I am grateful to have had during my career in Information Technology and Business. Thank you to each person I worked with along the way, and to the companies I've had the honor to represent with my work.

Knowledge is an area that I'm particularly interested in since school age years. In college I wrote a paper (wish I still had it) on self-knowledge. Although this project focuses on the concepts of illogical and logical knowledge in advanced modern times for business, self-knowledge is a big part of what has guided me through a successful career.

Nobody is more important to me than my family. Their unconditional love and support has helped me grow and succeed in my work.

Thank you to all at Emerald Publishing for their experience to bring my books to the public.

This page intentionally left blank

INTRODUCTION

Knowledge is a complex and confusing area because it's harder to define than basic information. The path that knowledge flows within an organization is equally important to the content being distributed and shared. Knowledge mostly flows bilaterally in various directions. Typically, an organization focuses on knowledge that flows and is shared vertically and horizontally. This isn't enough because there are sources of knowledge in many channels that extend beyond up or down and across. These channels are those linked to the major vertical and horizontal pathways. Knowledge sources are like pockets, pockets connected to the organization layers both internal and external. A good way to describe it is to think about a sponge and its unique permeable surface. The circular pocket pattern on a sponge surface represents pockets of knowledge in an organization. The absorbency of the sponge represents how well knowledge is absorbed and shared. This makes identifying the pockets of knowledge content and how it flows within an organization critical to understand. By comparison to information, knowledge relies heavily on the human aspect and good understanding of existing pockets of knowledge. Information is more exact and flows in single lanes between systems.

Information management focuses on data and activities on a factual basis. Knowledge management focuses on

individual's experiences, and methods of how knowledge is shared within an organization or community. Information combined with experience creates knowledge. Knowledge helps people in a variety of ways. For instance, learn and understand about business- or work-related topics. Knowledge also helps to solve problems, figure out causes to problems, and serves as a method of education.

One angle to view knowledge is that knowledge management evolved from information management. Knowledge is a much broader area and it is more people centric than dealing with information. Being people centric makes knowledge management more difficult to decipher and express. The challenges to interpret and articulate knowledge is the very cause to producing mass amounts of illogical or useless knowledge. This perspective creates an uncompromising situation and a common belief that collecting knowledge and a drive to store as much knowledge as possible is an effective strategy. It isn't, it's a perspective that will inflict disorder. This perspective doesn't care much about the quality or logical aspect to the inner parts of knowledge. The basis of this book is focused on knowledge management from an illogical and logical standpoint. The ideal perspective to change is approach knowledge management consistently and realistically.

In the information age, the boundaries between information and knowledge are blurred substantially making the task to choose content difficult. This creates issues with data waste, information overload, and the burdens of cost to house useless knowledge. In this book, I talk about methods to avoid these types of issues and how to segment data selectively, filter information to feed into knowledge management, and create context and guidelines for effective knowledge management practices. A good strategy for

managing knowledge and is one that creates a well-structured environment to support it.

Poor knowledge can come from an inadequate architecture; difficulties applying content to be useful, too much content, poor quality of content, or inconsistent and poor collection methods. Having good knowledge is attainable but if people can't retrieve or find knowledge they need, then the environment is not useful.

Knowledge is useless without proper context and application. Users need a fundamental understanding on what knowledge is and why the organization needs knowledge management procedures. In my experience, high-level plans for knowledge often do not work and will steer a good plan off course. Succeeding with knowledge management comes from a balanced plan with attention to detail to interconnect the pockets of knowledge, build quality logical knowledge assets, and methods to share them. This helps its users understand knowledge, how to use it, and where to find it.

A balanced plan includes business logic behind the plan and ways the company will manage it.

In this book there is a useable approach to support the creation of logical knowledge from a balanced knowledge management plan. This will aid its readers to understand this complex area. Quality knowledge is a highly effective nontechnical system in a pool of highly technical resources. It helps you to diligently make choices based on need and purpose. This book represents logical knowledge acquired and modernized to fit with current technical systems and tools.

This page intentionally left blank

1

SOURCES AND SEGMENTATION

Knowledge management is a sensible practice that encompasses a series of phases to produce a finished knowledge product. The finished product is a knowledge asset associated with an organization or community of interest. Content that is used to construct knowledge assets is ever changing and elusive. This makes housekeeping and the task to keep knowledge current extremely challenging. To a level, it may seem like an unworthwhile effort. It seems much more effective to collect knowledge in abundance and let people sort through it and figure it out themselves. Up front, this seems like the path of least resistance, but in the long run, it is not a good idea. It is not a good idea because it produces the most ineffective benefits to the user base. The user base includes customers which puts a business at risk to impacting good customer relationships, and revenue. The greatest amount of effort is invested in the preplanning and planning stages of knowledge management. Preplanning and planning stages of knowledge management and involved extensive resource and time investments will produce the most effective benefits to the user base. Mainly, the value will be experienced through

gained efficiency and increased productivity for the organization's staff users. For customers, it will improve their experience from interactions they have with the business. Portions of knowledge are meant to be used in many different ways and by different communities of people. Think of the sponge and interconnecting the pockets of knowledge sources to make them available throughout the organization. This requires a robust plan to stay ahead of requirements for knowledge and creativity that continually explores and improves the life cycle methods used to distribute and share knowledge assets. This is what we know as knowledge management (Table 1.1).

Managing knowledge is a difficult process to develop and sustain without central direction. Central direction is required for any knowledge program to achieve its goals. A common and major goal for managing knowledge well is to adopt a uniform approach and flexible set of activities. The major aspect that drives knowledge management is the fundamental understanding on why the organization needs knowledge management. Another major aspect is to have a good view of and understanding of the layout of the organization to be able to recognize viable sources for content. Knowledge management is more than just mapping information from the business intelligence areas within an organization. Mapping information is only one exercise and part of a knowledge management plan. Knowledge quality depends more on the human aspect and how well the content is formed to be logical knowledge. The human aspect comes from an individual's insight, their experience, and skills they hold. Insight into an internal knowledge of an individual is just as ever changing as the content being used as a knowledge asset. Keeping knowledge current is an issue that most likely cannot be mastered, but it can be an area that is significantly improved through the use of a realistic strategy and process. The mistake most

organizations make is approaching knowledge the same manner and with similar processes that we use for information management. Remember knowledge is elusive and is ever changing. For example, a knowledge contributor provided insight to a specific situation that helped define conditions on how a decision was made. This insight will change over a period of time. The reasons why insight changes can be from new information or experiences. New information and/or experiences has improved their insight. The elusive part is related to how well knowledge contributors maintain their knowledge assets. This makes managing knowledge a multi-faceted discipline entailing a set of processes and driven through intellect and awareness.

Knowledge management is a complex and dynamic area that provides a considerable amount of business value and a lot of struggles at the same time. Once an organization has a good understanding on why they need knowledge management and able to define requirements for a knowledge program is when planning begins. Strategic planning begins by defining the traits of the program and what knowledge is used for. This book is written from a strategic perspective rather than a tactical one. This viewpoint will follow a strategic path from a clear starting point to guide the reader through an approach to focus on the logical aspects to knowledge management.

Knowledge management considers how people learn, share, and apply content. Information management considers business intelligence and data generated within systems. Knowledge and information are very similar in nature but have a distinct difference. Distinction between the two is important to understand before creating a knowledge plan. Understanding the difference between information and knowledge will be helpful in identifying what parts of information is used for knowledge content. Content is handled

through content management practices. Content management practice is a part of knowledge management. Technology systems used to manage content and knowledge are very similar in functionality if not the same.

For example, you can create a new web page and it could be part of an organization's intranet. There can be content on this web page that could have a link or multiple links to an external website. The new page that was created can be accessed from a laptop or a mobile phone. The content of the web page is made available to the people within the organization, enabling them to search for information on the new web page. For both content and knowledge management practices, the web page content remains on a central storage repository. In this example you would see that knowledge management sits within the content management realm because they share the same systems. The distinct difference is that content does not specialize in knowledge. Content management is like the factory warehouse doing the work for knowledge, and knowledge management is the packaging of the product being made in the factory. Content and knowledge management are commonly known through websites accessed via the Internet and found on company's internal intranet. Content is made available through open platforms because it is the easiest type of platform to collect large amounts of knowledge in a short amount of time. Content is what is managed in a knowledge management environment and processed to ensure the substance of the content is logical, useable, and reliable.

Open platforms for knowledge environments are tricky. There are guidelines to differentiate between good and poor knowledge; however, they are sparse. Once a knowledge platform is open publicly to the organization, it exposes the content to damaging effects that can devalue its use. Knowledge user agreements are a good way to align knowledge

content with need. Knowledge user agreements should be developed in part of the planning phase for a knowledge program. Knowledge user agreement gets the entire user base within an organization that will benefit, contribute, transfer, share, and train on knowledge on the same page and coordinates them to align to the same set of procedures.

A knowledge user agreement covers

- How to contribute to the knowledge platform and expectations for how frequent content is maintained.
- Instructions to edit knowledge content.
- Details on the distinction between what is factual and subjective. This part sheds light on the logical and illogical knowledge variances.
- How to transfer knowledge and what systems and methods are approved to use. Details on who is authorized to receive knowledge. For knowledge that is protected under regulation and compliance, consult with the organization's legal department and use contractual agreements where needed to protect the company's knowledge assets.
- Descriptions and attributes about the knowledge management culture.

KNOWLEDGE STRATEGY

A high-performing knowledge program begins with a well thought out and practical strategy. A knowledge strategy is to build the environment that creates, stores, supports, maintains, distributes, combines, and improves knowledge assets. Begin strategizing with brainstorming sessions. From brainstorming, the charter for the knowledge environment is decided and

documented. Develop a clear strategy that supports the vision and mission for the organization to achieve its intentions (goals). Brainstorming and strategy creation is done first because the majority of the work involved to set up a knowledge environment is done first, before the processes are designed and documented and the technology setup and configured.

How the knowledge will be used is a big part of the strategy and the brainstorming sessions. For instance, most organizations use knowledge management and relation to organizational learning. Much of the knowledge assets are used for organizational trainings for new employees and continuing education for existing employees. Knowledge specifies what actions to take in relation to a specific set of circumstances. This relates to organizational learning as much as it does in supporting daily business operations. Individuals are capable of knowing how to handle and manage knowledge; however, knowledge management is an organizational activity that focuses on knowledge management goals and how to achieve them.

The following key steps are involved in creating a knowledge strategy:

1. The first step is to **create** the knowledge environment design model. Make a list of what the organization needs for managing knowledge and define what exists in the organization for business intelligence. Use this list to determine what information from the company's business intelligence will be utilized in the knowledge environment and link content to users. Explain who the audience is for each packet of content. Group content by audience interest. In a design for the knowledge environment group them by

    - Organizational level, organizational learning, customer-related, support-related, service or product delivery, and

vendor management: Grouping audiences into major groups will help drill down and define subgroups within each higher group. This makes designing the landscape for the knowledge environment well defined for process, technology, public content, proprietary content, roles and responsibilities, and content ownership. Public content is shared at the organizational group level and support-related content would be considered proprietary contact. The reason we separate public content from proprietary content is to determine the specific type of technology that will be used to store and distribute the content to the group community. This includes information that is created within the occupational silos that could be utilized by other groups in the organization to save time from having to recreate content. For example, a wiki-type technical platform is best suited for public content that is shared to the organizational group and its subgroups.

- The theme of the knowledge environment is to transport business intelligence (information) to a centralized area of the organization and feed it into acknowledge technical landscape (in Chapter 4, technology is explained for the knowledge environment).

2. The next step after brainstorming is to prepare for **content collection.** We have established business intelligence (information) is a feed into the Knowledge Management process and it runs in a knowledge environment. Content collection is a set of procedures utilized to leverage business information and utilize it as a knowledge asset. Collection methods will be a combination of automation and manual effort and is done by a role that has investigative capabilities. Content collectors are like detectives; they are familiar with the business layout and where to find current and

authorized information. Content collectors trace the content to the originator or the person or team who developed the content.

3. After content collection is accomplished, the next step is **storing.** Content storing is a set of activities that moves the content that was collected and brings it into repositories within the knowledge environment. The repository is set up to support either public or proprietary content. In preparation, activities for this step focus on storing public content into a public repository and proprietary content into a proprietary repository. Once the content is stored in the knowledge environment public or proprietary repository, from there the content is tagged based on specific specifications for the use of the knowledge content.

4. The next key step while strategizing to build a knowledge environment **is categorizing and classifying** the collected content stored in public and proprietary repositories. Classification followed by categorization is done by community grouping, content topic, process, or department or categorized based on technical and nontechnical information or by customer, etc. If there are unclear arrangements for this step, you may need to go back to the brainstorming phase to deliberate more on what is the best way to classify and categorize the content that has been collected. This will help decide which structure for the classification tree will best suit the knowledge environment and how the content will be used.

    - Reasoning skills can also be applied when you regroup to brainstorm on the best way to structure and distribute the knowledge content already collected. Looking at the content that has been collected is helpful to determine the labels and the tree structure. It also helps to