

Best Practices for Knowledge Management: Tactics

1. Social Networking

Social networking is one of the broadest categories of approaches and tools, including Communities of Practice, networks, open collaboration fora, dialogues, discussion spaces and open space sessions to name just a few and there are a plethora of technology tools in common use. Yet for all of these, the starting point for any organization considering social networking is to understand that the practice and benefits of social networking are not synonymous with the technology that facilitates it.

Given the dramatically increased span of connectedness between people that modern technology facilitates, social networking can be seen as a movement from traditional, hierarchical management styles towards a more open, democratized, even exploratory approach. It's an open and inclusive approach to person-to-person engagement: people engaging with others on topics of interest, regardless of position title and formal mandate. The "low hanging fruit" of social networking are those serendipitous connections among people who would otherwise not know each other that result in collaboration that can benefit the organization. These connections present fertile ground for innovation, especially when dealing with multi-disciplinary situations. Deep sharing of personal experience and insight can accrue from an environment characterized by trust, integrity and mutual respect, and where a shared purpose exists.

Certainly, some organizations have embraced social networking and are actively employing it, and not only internally, but with their customers and especially with potential customers. The openness and connectedness that social networking entails provides organizations with new ways to access segments of the population and markets that may otherwise be virtually unattainable. This is a clear evidence of one of fundamental principles of KM cited by Davenport and Prusak in their book 'Working Knowledge: How Organizations Manage What They Know', specifically, technology enables new knowledge behaviours. For organizations that wish to leverage this new approach, it requires a huge shift in management style, communications, outreach, collaboration, innovation, and reduced bureaucracies. The emergence of social networking has dramatically changed societal culture and norms, and organizations are beginning to change to such an extent that it constitutes a revolutionary change in the way work and life are merging.

Communities of Practice

While there are many effective and useful approaches and tools involved in social networking, Communities of Practice (CoP) are widely cited as the most effective approach of ongoing developmental knowledge creation, transfer, and management in organizations. Indeed it is not uncommon to see organizations only employ the tactic of CoPs in order to manage their knowledge, or to start with CoPs whether or not other approaches are ever adopted as well. Notwithstanding this affirmation and the plethora of good literature available on the topic of CoPs, they can easily fail without a solid understanding of the success factors.

Best Practices for Knowledge Management: Tactics

What makes CoPs different from teams, work groups, networks? Those differences mean that a different management style is necessary. A CoP consists of a group of individuals from across the organization (and possibly outside) who perform a certain type of work, the “practice.” It may also consist of people who have experience with the practice but who have different responsibilities in their current job. For various reasons they recognize that they need to learn from each other and work together to improve their own work, and as such, these individuals share a commitment to the practice. They usually are, or become, the stewards of the knowledge and expertise around the practice in their organization, and are most often the “go-to” people when a question or need arises on the topic. As they work together on problems or opportunities related to the practice and share their experience and insights, they also develop a commitment to each other and develop a sense of community.

There are many excellent reference sources available and so, rather than replicating any of this material we will contribute to the body of knowledge around CoPs with a simple focus on three key success factors in effectively launching and managing them.

1. CoPs need to focus on what is important to the organization. This means that the CoP addresses a real business need, not a “nice-to-do” but a real business priority that is not being satisfactorily met elsewhere. CoPs *can* flourish even if not business-focussed, but the best practice and the most likely scenario for success is to ensure the CoP has a clear focus on knowledge and expertise of direct relevance and importance to the organization. At the same time, it is advisable to avoid any kind of formal structure (such as developing a mandate, terms of reference, or charter), as that format can divert the CoP towards a committee or project team role and curtail innovation from empowerment. A statement of scope, however, may be useful for clarification as long as it does not become an arbitrary hindrance to advances in thought or practice leadership.

2. CoPs need a healthy internal “management” function. CoPs need to be led or stewarded from within, by one member or a small group of members or a distributed network of members. Of course this style of management is one of participative engagement and facilitative guidance, as opposed to a more traditional command-based authoritative leadership style. The main functions involved in managing a healthy CoP include:

- **Thought (or practice) leadership:** The CoP exists to improve the organization’s capacity on a certain topic, which means learning, innovating, developing good (best) practices. That capacity development requires knowledgeable and credible practitioners who are willing and able to lead the exploration and development.
- **Facilitation:** There is an art and science to being a good facilitator, able to draw out ideas and insights, elicit excitement, and achieve consensus and commitment during a process. There are some differences in online versus person-to-person facilitation, but the same principles and largely the same skill sets apply.
- **Scope management:** It is often easy to encounter “scope creep,” so the CoP leader(s) needs to ensure that the focus does not get diverted into areas that become

Best Practices for Knowledge Management: Tactics

red-herrings, and that any significant change is made by consensus. The role of the leader(s) can become difficult in achieving a delicate balance between fostering and supporting exploration and innovation in thought or practice while still paying attention to the broad parameters of the CoP.

- **Boundary management:** Frequently other CoPs, networks, groups or individuals are discovered working on aspects of the same or related topics. Effective CoPs are able to build and leverage effective relationships with those other sources without duplicating effort or becoming embroiled in turf wars.
- **Results management:** If a CoP is the best kept secret in the organization, it may not be reaching its potential. When the CoP produces something useful or accomplishes something important, it is usually advisable for the CoP to make the achievement known to the organization. Publicizing the CoP's success and value will also increase its credibility.
- **Event/activity management:** Events and activities, whether online or in-person, can be especially effective for achieving results and building the community. Event organization and management skills can be immensely important for CoPs to engage people, build community, innovate and share valuable insight and materials, liaise with other communities or topic areas, etc.
- **Relationship management:** A community exists because people are drawn together to work and learn from each other. This is inherently a social activity. Effective engagement of people often occurs on three dimensions: intellectual, emotional and social. Personalities, attitudes and behaviours are not always conducive to the level of openness, trust, and safety required among CoP members, so knowing if and how to intervene effectively requires insight.

Moreover, CoPs typically consist of individuals at various levels of proximity to the practice, such as long-time practitioners (maybe subject matter experts), new practitioners, individuals who are very interested and/or indirectly involved in the practice, and those who might be simply curious about it. Understanding people, being aware of their needs, and building good relationships are areas of critical importance.

- **Content Management:** CoP members typically share documents, links and other sources of information, but flow can easily become a chaotic mess if good basic information management practices are not followed. The explicit knowledge produced by a CoP is an important output and requires effort to ensure its accuracy, completeness, and comprehensiveness. The CoP's value to the organization depends on it.

Best Practices for Knowledge Management: Tactics

- **Technology/platform management:** Most CoPs use some form of technology as a work space and communication platform, frequently one or more collaborative tools such as discussion fora, wikis, or blogs. Technologies almost always require some form of behind-the-scenes administration and support. One frequent mistake made by organizations is to delegate responsibility for the *business uses* of a technology to the technologists, especially once the technology has been implemented. Technology is a business tool and is most effective when managed as one. In the case of a CoP, the technology platform must be managed as a support tool for the business that the CoP addresses.

3. CoPs need a specialized style of management support and engagement. CoPs can exist and be useful working under the radar or in very localized settings, but where organizations want to employ CoPs as part of a *corporate* KM strategy, support and engagement from the organization's managers and leaders is required.

While the governance of the CoP takes place from within, there is a role for the larger organization to ensure its ongoing success. The main function is to *nurture* the CoP: in other words, to create the most effective environment within which the CoP can function and succeed. The organization needs to know what the CoP needs and rationalize how it can best help. Sometimes an organization may appoint a champion or sponsor who is a key link with the formal hierarchy to help the CoP get what it needs, advocate on its behalf, help report on its success, and channel or champion proposals for significant organizational changes.

A CoP will be unsuccessful if the members feel that they are powerless to make actual changes in their work even though a CoP will typically not have free rein to make any change it likes. An appropriate balance is required; there is no one-size-fits-all solution. The scope of authority and autonomy should be clearly understood between the organization and the CoP. Frequently, CoPs begin with modest direct authority and autonomy, usually localized in resident 'experts', and are limited to making recommendations on improvements of any significant scope, but able to make small changes themselves. As the value of the recommendations are realized, the authority and autonomy tend to increase. This incremental process of value creation is critical for sustaining and leveraging a CoP over time. Stagnation will signal a decline in the utility of a CoP and the eventual demise of the function.