Knowledge Ready Organization?

Building a KRO: Achieving Sustained Performance through knowledge-informed strategic initiatives

Dr Arthur Shelley
Intelligent Answers

23 September, 2016
@Metaphorage
@IntelligentAns

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Knowledge Ready ≠ “Perfect”

A journey of continuous improvement
Cultural Insights
Achieving KRO creates success

Knowing, Doing, Being... Becoming... Successful

Opportunity
Why?
Who?
What?

Know, Learning, Reflective Practice, Ownership, Impact, Change, Benefits, Insights, Project Management, Succession, Mentor, Outputs, Quality, Innovation, Performance


Explore
Discover
Prepare
Apply
Success

INTELLIGENT ANSWERS
BUILD CAPABILITIES & PRODUCTIVE RELATIONSHIPS THROUGH CREATIVE LEARNING

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Co-Create Insights

Question: I am most creative when I am …

Options

A: under great pressure to perform and focused on the challenge at hand
B: actively reflecting on the issue later
C: out of context of the problem, not thinking about it (shower, driving…)
D: Other (share in discussion)

Discuss why we experience this differently (and what this means for your group dynamics)
<table>
<thead>
<tr>
<th>Assessment Criterion</th>
<th>Unaware 0-1</th>
<th>Aware 2-3</th>
<th>Starting 4-5</th>
<th>Managing 6-7</th>
<th>Strategic Application 8-9</th>
<th>Embedded 10</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy</strong></td>
<td>Data, information and knowledge, not proactively leveraged to inform strategy</td>
<td>We know we should analyse data and use knowledge for strategic initiatives, but it has low importance</td>
<td>Knowledge informs decision-making in some parts of the organization.</td>
<td>A clear definition of KM exists and is actively applied in many improvement initiatives</td>
<td>Knowledge flows through the organizations through proactive sharing to inform strategy and organizational goals</td>
<td>Knowledge co-creation is standard practice in all strategy development and is applied organization wide</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td>No leadership support for knowledge initiatives</td>
<td>Leaders can state why knowledge is critical to the business, but little action taken</td>
<td>Leaders openly support Knowledge driven performance</td>
<td>Leaders demonstrate passionate support for knowledge driven strategic decisions</td>
<td>Knowledge leadership is an integral part of development programs and leader practices</td>
<td>Our leaders are invited to share insights externally and are respected as thought leaders</td>
</tr>
<tr>
<td><strong>Culture</strong></td>
<td>We don’t internally share insights with each other or learn from our mistakes</td>
<td>Some teams talk about possible benefits of investing in connections and relationships, but sharing is informal.</td>
<td>We benefit from a desire to share and co-create knowledge in some teams</td>
<td>Knowledge sharing is commonly practiced in most teams and integrated across the organization</td>
<td>Team members are actively engaged in sharing ideas and concepts to generate value and learning.</td>
<td>Knowledge successes and learning from failure are commonly shared to inform, improve and engage</td>
</tr>
<tr>
<td><strong>Process</strong></td>
<td>No processes/policies to support knowledge activities.</td>
<td>Some basic documentation helps capture and transfer of ideas and skills happens, but is mainly ad hoc.</td>
<td>Some localised knowledge transfer processes showing some benefits in places</td>
<td>We have formally structured knowledge creation and transfer plans for many roles and situations.</td>
<td>Processes strongly support building &amp; transfer of knowledge &amp; understand what should be done and how to do it</td>
<td>We routinely transfer knowledge between people and have processes to measure benefits from activities.</td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>We don’t have standard tools to support knowledge activities</td>
<td>Some tools are being intermittently used by some teams, mainly driven by a few people</td>
<td>Some specific tools have been invested in for specific knowledge initiatives</td>
<td>Most processes are well supported with knowledge tools and most people use them well.</td>
<td>There is proactive use of all tools provides to support knowledge initiatives and change</td>
<td>Tools are creatively used and applied to stimulate and enhance impact of knowledge work and enhance org performance</td>
</tr>
<tr>
<td><strong>Impact</strong></td>
<td>We are not encouraged to innovate or improve practices.</td>
<td>There is some encouragement to apply knowledge to improve, but implementation is limited &amp; localised</td>
<td>We create some benefits with tangible value generation, but it is hard to measure and track</td>
<td>Creative innovation practices are driven across teams by knowledge co-creation that shows visible tangible benefits</td>
<td>Spectrum of qual and quant measures demonstrate sustained and increasing generation of value from knowledge initiatives</td>
<td>Our org is high performing as knowledge and continuous innovation is intrinsic to practice and culture</td>
</tr>
</tbody>
</table>
## Criterion 1: Strategy

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Score</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is the KM initiative aligned with organisational goals?</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Definition of KM vision and mission statement</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Connect between KM focus and organisational goals</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Updates to KM along with strategic change in the organisation</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Focus of KM on efficiency, innovation, and risk management</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Phases of KM plans and maturity curves</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Inter-disciplinary nature of core KM committee</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Strength of KM governance/standards</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

### Strategy Total (8)

**Average: 7.00**

---

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Initial Opportunity Assessment

Highlight:
3 strengths
3 weaknesses

Discuss impacts of these and how to rectify them.
Leading Knowledge Flows

Prioritise

Plan

Apply

Deliver

Iterative strategic cycles

Alignment

Purpose

Environment

Attitude

BUSINESS GOALS

Existing Knowledge

Strategy

Improvement Opportunities

People

Interacting

Collaboration

Projects

Driving Change

New Knowledge

Outcomes

Outputs

Benefits

Beneficiaries

SUPERIOR PERFORMANCE

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Strategy Decision Challenge

Working **ON** the business
- Strategy orientated
- Future focused

Working **IN** the business
- Task orientated
- Often past/present focused
### Criterion 2 - Leadership

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presence of highest levels of leadership in formulation of KM strategy</td>
<td>8</td>
</tr>
<tr>
<td>Executive support to KM given from the highest leadership</td>
<td>8</td>
</tr>
<tr>
<td>Passion of KM leader, ability to inspire organisation to excel in KM</td>
<td>8</td>
</tr>
<tr>
<td>Regular participation in KM processes, activities, tools by leaders</td>
<td>8</td>
</tr>
<tr>
<td>Perseverance of leaders to sustain KM in the long run</td>
<td>7</td>
</tr>
<tr>
<td>Inclusion of KM in leadership development programmes</td>
<td>8</td>
</tr>
<tr>
<td>Support given to next tier of emerging KM leaders</td>
<td>7</td>
</tr>
<tr>
<td>Thought leadership by top managers in internal and external KM/management forums</td>
<td>7</td>
</tr>
<tr>
<td>Connections made by organisational leaders to external KM bodies, e.g. academia</td>
<td>8 7.70 Average</td>
</tr>
<tr>
<td>Contributions by leaders to the overall KM community (Singapore and beyond)</td>
<td>8 7.70 Average</td>
</tr>
</tbody>
</table>

**Leader Total (10)**: 77

**Average**: 7.70
What is Strategic Leadership?

- Transformational
- Strategic – future goal aligned
- Time proactive
- Unlimited & Open
- Continuously emergent

Learn: Adjust for discomforting evidence

Align: Identify and address conflicting interests

Decide: Assess trade-offs, risks, consequences

Interpret: Test other thinking before deciding

Challenge: Seek diverse views, multiple perspectives

Anticipate: Gather information widely and predict

Adapted from Schoemaker, Krupp & Howland 2013
Strategic Leadership: The Essential Skills
Harvard Business Review, Jan-Feb

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Lead AND Manage

Lead
- People
- Influence
- Outcomes
- Stakeholders
- Being
- Emergent
- Complex
- “Soft”
- Creative
- Persuasion
- Trust
- Emergent
- Perception
- Inspire
- Complex
- Ethos
- Followers
- Engage
- Followers
- Coach
- Motivate
- Mentor
- Growth

Manage
- Plan, Direct
- Resource
- Execute, Focus, Risk
- Control, Reality, Outputs
- Task, Doing, Process, Report
- Present, Past, Deliver, “Hard”

Logos (rationale) Ethos (credibility) Pathos (Emotions)

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
## Criterion 3 - Culture

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is KM nurtured and sustained for the long run by creating a knowledge sharing culture?</td>
<td>8</td>
</tr>
<tr>
<td>How are people inspired to learn, share and grow?</td>
<td>8</td>
</tr>
<tr>
<td>Clearly defined attributes of KM culture</td>
<td>7</td>
</tr>
<tr>
<td>Incentives to grow and sustain the KM initiative</td>
<td>7</td>
</tr>
<tr>
<td>Training/support given to reinforce knowledge work</td>
<td>7</td>
</tr>
<tr>
<td>Branding and communication of KM initiative</td>
<td>7</td>
</tr>
<tr>
<td>Use of stories for internal and external knowledge sharing</td>
<td>6</td>
</tr>
<tr>
<td>Periodic events to celebrate KM</td>
<td>8</td>
</tr>
<tr>
<td><strong>Culture Total (8)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>7.25</td>
</tr>
</tbody>
</table>

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Cultural Influences

How we do things (behave)
Values and norms
How we interact
What we accept and reject

How we collectively think
Thoughts, reflection

What we EXPECT
Relationships, practices
Customs, Rituals, Courtesies
Roles and role models

How we communicate
Language, metaphor, symbols

Source: Van Jones

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Many perceptions of Success

My \textit{REALITY} versus Your \textit{Perception}

- Needs
- Wants
- Fears
- Agenda

- Environment
- Health
- Politics

- Geography
- Wealth
- Weather

- Expectations
- Mindsets, Prejudices
- Language, Self Image
- Experiences, Attitudes
- Behaviours, Culture, Values

Common Human Fabric?
Culture of alignment to purpose

“Culture eats strategy for breakfast”
Relationships and knowledge transfer

Desirable Outcomes

Collaborate

Share

Trust

Interaction

Relationship

Distrust

Non sharing

Confrontation

Suboptimal outcomes

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Zoo Metaphor for team building

Team dynamics assessment
What does your team look like?
Do you have the right balance of behaviours to deliver?
Old ideas can still be valid

- **Pathos**
  - emotion, empathy (buy-in)
  - imagination
  - *story, metaphor, simile*

- **Ethos**
  - credibility, ethics, trust
  - qualifications, expertise
  - experience

- **Logos**
  - rationale, logic
  - facts and figures, consistency
  - look knowledgeable and create confidence

*On Rhetoric*, Aristotle (350 BCE)
### Criterion 4 - Process

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is workflow designed and enhanced to support KM?</td>
<td>7</td>
</tr>
<tr>
<td>How these processes are made a natural part of knowledge behaviour?</td>
<td>7</td>
</tr>
<tr>
<td>Design of processes to promote knowledge capture &amp; sharing</td>
<td>7</td>
</tr>
<tr>
<td>Processes for explicit and tacit knowledge, internal and external knowledge</td>
<td>7</td>
</tr>
<tr>
<td>Blend of embedded processes and pre/post action review processes</td>
<td>6</td>
</tr>
<tr>
<td>Mix of fulltime and part-time roles for executing knowledge processes</td>
<td>8</td>
</tr>
<tr>
<td>Long-term sustainability of these processes</td>
<td>6</td>
</tr>
</tbody>
</table>

**Average:** 6.83
Conversations That Matter

“What are we trying to achieve?”

“Conversations That Matter” (Shelley, 2009)
Knowledge Based Initiatives

**Communication:** Cyclic at all stages

**Discovery**
- Search, Develop.

**Define**
- Plan from known foundation.

**Refine**
- Assess feasibility

**Develop**

**Deliver**

**Review**
- Confirm Benefits

**Leverage Outcomes**
- New opportunities or extensions

**Learning:** Learn Before, During and After. **Knowledge:** Capture and Sharing

<table>
<thead>
<tr>
<th><strong>Foundations</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Behaviours:</strong> Collaboration leadership, Knowledge capture &amp; sharing, Attitude biased towards leverage, Seek before reinvent, Participative learning, Support for development programs</td>
</tr>
<tr>
<td><strong>Networks and Communities:</strong> Connect, Dialogue, Relationships, Peer Assist, Profiles, Regular Interactions Roles, Purpose, Development, Succession plans, Benefit focused</td>
</tr>
<tr>
<td><strong>Processes:</strong> Knowledge activities embedded into normal operations and used routinely “KM Supports”: Discovery, Benefits definition, Measures, Capture, Transfer &amp; Capability build</td>
</tr>
<tr>
<td><strong>Tools:</strong> Knowledgebase, Functions for capture, classification, search, storage, retrieval and communication</td>
</tr>
<tr>
<td><strong>Infrastructure:</strong> Intranet, Connectivity, Reliability, Performance, Security, Measures</td>
</tr>
</tbody>
</table>

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Embed Principles into Processes

LEAD

Converse
Listen

Reflect

Adapt for
Context

Apply
Collaborate

DEVELOP

Read
Challenge

Learn
Write

SHARE

CREATE

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.
Communication and 5 C’s

1. Communicate
   - Engagement
2. Connect
3. Collaborate
4. Capitalise
5. Communicate
   - Success story
## Criterion 5 - Technology

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>What kinds of legacy and emerging tools are used to support and drive KM in the long run?</td>
<td>7</td>
</tr>
<tr>
<td>How effectively do people use these tools?</td>
<td>8</td>
</tr>
<tr>
<td>Tools to integrate legacy content and emerging assets</td>
<td>7</td>
</tr>
<tr>
<td>Alignment of tools with knowledge processes and cultural objectives</td>
<td>8</td>
</tr>
<tr>
<td>Tools support for suggestion/validation/reuse of knowledge</td>
<td>7</td>
</tr>
<tr>
<td>Mix of content and collaboration tools</td>
<td>7</td>
</tr>
<tr>
<td>Alignment between enterprise tools and social/mobile media trends</td>
<td>7</td>
</tr>
<tr>
<td>Secure of the knowledge access system</td>
<td>7</td>
</tr>
<tr>
<td>Richness of visualisations/dashboards of KM activity</td>
<td>5</td>
</tr>
<tr>
<td>Effectiveness of training given to knowledge workers on how to use these tools</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tech Total (10)</th>
<th>70</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>7.00</td>
</tr>
</tbody>
</table>
Start with Why (Value)
Tools support people to implement process

**Barriers**

- People
  - Stubborn people
  - Geography
  - Rigid/insecure
  - Silos
  - People/expectations/generations
  - Culture
  - Sharing/communication/participation

- Process
  - Budgets (constraints)
  - Lack thereof/poor prioritisation
  - Org structure

- Tools
  - Extract/capture

**Time**

**Short Term Actions**

- Induce the staff
  - Invite an expert
  - Network groups
  - Brown bag lunch
  - Friday drinks

- Interactions
  - Socialisation
  - Participation
  - Culture

**Long Term**

- Maintain
- Build
- Mop up
- Create/innovate

Init.
### Criterion 6 - Impact

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>What impacts have been demonstrated with respect to success of the KM initiative?</td>
<td>8</td>
</tr>
<tr>
<td>How are the metrics themselves assessed and improved?</td>
<td>7</td>
</tr>
<tr>
<td>KM outcomes in the form of new or improved products/services/processes</td>
<td>7</td>
</tr>
<tr>
<td>Spectrum of metrics used: activity, process, knowledge, people, outcome</td>
<td>7</td>
</tr>
<tr>
<td>Blend of quantitative and qualitative measures</td>
<td>8</td>
</tr>
<tr>
<td>Mix of internal (employee) and external (customer, citizen and partners) impacts</td>
<td>8</td>
</tr>
<tr>
<td>Validation of impacts by third parties</td>
<td>7</td>
</tr>
<tr>
<td>Achievement of thought leadership in KM has been achieved (e.g. awards, publications)</td>
<td>7</td>
</tr>
<tr>
<td>Assessment and refinement of KM metrics</td>
<td>6</td>
</tr>
</tbody>
</table>

**Impact Total (9)**: 65

**Average**: 7.22

**Grand Total**: 367

Average: 7.20
Measuring Impact

• Intangibles (indirect links to tangibles)
  – Success stories, personal value, trust
  – Loyalty, turnover, informal COP’s
  – Attendance, attraction, retention…

• Tangibles
  – Money (savings, growth, efficiencies)
  – Stock market value, budget provided, ROI
  – Performance improvement, effectiveness
  – Intellectual Property
Starting provocative conversations to build trust and relationships

Why
Sustainable performance outcomes
Achieved through prioritised & resourced
Continuous capability development

Who
Enabled by future-aligned
Strategic knowledge-based projects

What

How

When

Where

Leading inclusive environments to stimulate co-creation of knowledge
Self Commitment

Things I am going to STOP doing ...

Now What?

Things I am going to START doing ...

Things I am going to CONTINUE doing ...

+ Others (behaviours)
+ Action
= Outcomes
Readings on Teams

Shelley, AW (2007) The Organizational Zoo, A survival guide to workplace behavior Aslan Publishing Fairfield. USA.
Garfield S (2007) Implementing a successful KM program ARK Group UK


Accessed September 7, 2011

Contact

Arthur Shelley
arthur@organizationalzoo.com
FREE behavioural profile
www.organizationalzoo.com/profiler
Insights into behaviours
www.organizationalzoo.com/blog
www.organizationalzoo.com/ZooTube

Consulting and mentoring
www.intelligentanswers.com.au

Ph +61 413 047 408
@Metaphorage
#OrgZoo

© Arthur Shelley 2016 Permission of the author required for commercial use or storage.