How is my organization doing with information and knowledge? The information professional’s checklist

Knowledge management proved a rich opportunity for information professionals to build successful careers—as consultants or as employees managing KM projects or teams in organizations recognizing the value of formal approaches.

In organizations not yet having established formal KM departments or roles, the reasons for not doing so could be many but are likely to include elements of common refrains heard from busy professionals (I paraphrase from numerous interactions over the years):

- There’s no time to use the e-room or wiki or read the alerts.
- I have trusted contacts to seek out if I need help.
- I know it sometimes wastes time to be asking around, but it still seems the most effective method for me.
- No KM person can know what my job is, and therefore I don’t believe any such person can address my work practices or assist me in any way.
- I’m willing to participate in the discussion on the internal forum, but this week’s deliverables take precedence.

In other words, KM may get pushed off today’s table because time runs out. That’s a pity. In this chapter, we focus on typical organizational functions to illustrate how information professionals may contribute value by pointing out opportunities to achieve benefits such as reduced risk, shorter processing time for resolving customer tickets, earlier detection of competitively valuable signals, and much more.

7.1 The information professional’s radar: Adding value through observation

No matter where information professionals may be positioned in an organization, they have opportunities to conduct “mini-audits” of its culture by posing and attempting to answer questions related to information and knowledge related behaviors. Bringing challenges such as hidden costs or financial or reputational risk and opportunities such as enhancements in business processes to the attention of the right people could turn out to be beneficial for the organization. We information professionals are uniquely equipped to look at the activities in an organization through the information and knowledge lens. Subject matter experts focus on their individual projects and deliverables while we focus on the ways data, information, and knowledge are handled. Whether we have been formally asked or not, we are in a position to detect risk and opportunity.
For context, let us acknowledge that “best practices” may be an illusion. Each organization—in fact each department within it, whether by way of geography or function—is a unique mix of purpose, history, resources, individual approaches, and many similar factors. It is impossible to generalize how an enterprise unit ought to go about information and knowledge management. What is possible is to gauge the level of awareness among managers and team members as to the suitability of the practices being followed now or potential new practices to be followed in future.

I believe strongly that information professionals have a tremendous amount to offer their employers when they train a sharp light on operational aspects like the ones illustrated below.

### 7.2 To start: What signs indicate the “knowledge culture” is healthy or not?

Some overt symptoms provide an immediate indication whether the knowledge culture in an organization is accidental or deliberate. For example, the presence of a Chief Knowledge Officer or similar position with central responsibility for information and knowledge related policies and practices says something about how their importance is perceived. The same would be true if each business line or operational unit has its own knowledge officer. Such procedures as mandatory onboarding courses covering policies and tools related to research and records management tell a story. Job descriptions specifically addressing the required information and knowledge behaviors similarly indicate that the organization’s leaders have thought through the benefits of formalizing expectations. It sends a strong signal about the understanding of the impact of good knowledge management when an information or knowledge audit is undertaken from time to time or in connection with specific projects, just as the presence of an entity focusing on knowledge does (the entity could be called a library or an information center or could carry many other labels). Conversely, it could be a giveaway if we hear frequent mentions how long it takes to find the right person to approach for assistance or comments about how difficult it is to use the corporate document management system.

Paying attention to these and many other indicators could open career doors if we turn our observations into proposals and business cases for investments or activities to improve information related processes so as to achieve business goals (better competitive ability, reduced costs, protection against risk, and many other desirable outcomes).

### 7.3 Is there a library, information, or knowledge center?

Discussions have gone on for as long as we can remember about the best way to name an organizational unit providing information services. The concern that “library” would connote dusty books drove a trend toward variants of “knowledge center”—with the occasional anecdotes that employees did not understand the meaning of the
new name and mistook it to refer to, say, an employee training center (“oh you mean the library—why didn’t you say so?”). The discussion’s longevity underscores the never-ending need to raise awareness among employees about the services a library/information center offers. In choosing an approach to information support for knowledge workers, executives may regard a library or information center as one element in such support; other options exist. These questions are pertinent:

**Without a library/information center:**

- How are knowledge workers getting the information they need for their work—from within and from outside?
- Could the information gathering task be carried out by others while subject matter experts focus on analysis? (It is possible the topic at hand is of a nature that only domain experts are able to research the relevant sources appropriately.)
- Do employees who came from organizations where they could consult with information experts express a concern over no longer having that ability?

**With one:**

- Are subject matter experts familiar with the services and content offered, and how and why do they use them?
- Do department managers similarly understand what is on offer and ensure their team members take advantage of the expertise in the library?
- Are regular audits done to align employee needs and library services in light of evolving operational and business realities?

7.4 **Is there awareness of options for staying informed?**

In just about every project I do, I see evidence of the sentiment that “I want to be informed … not inundated.” People simply do not want information that is not directly actionable, that does not make a difference in current projects, or that does not somehow impart a concrete advantage—right now.

Current awareness is a challenge for many subject matter experts as their working days are chock full.

In knowledge intensive settings, colleagues find it natural to send “did you see this article” type messages. Such well-intentioned sharing may lead to flurries of duplicate exchanges, and over time individual members of the team may hesitate because they do not wish to offend colleagues by suggesting they did NOT see a given item. The end result is that a key item goes unnoticed by the person who could have benefited or that the team is without the opportunity to apply the information in it.

Here are some considerations going into strategies for alleviating that challenge—without ending up being perceived as a nuisance. Information professionals are well placed to examine this space for opportunities:

- When knowledge workers are keenly aware of the need to stay abreast of developments and put effort into maintaining a personal lineup of sources to monitor and/or news “feeds” to receive, it is likely the organizational culture supports such behavior. Conversely, employees may sometimes rely just on conversations with colleagues to stay current.
Do employees comment how they are uncertain they are fully up to date and express anxiety when they are caught unaware of relevant news?

Does the culture provide for the time to review new professional news and literature as a necessary part of subject matter experts’ ability to stay ahead of the curve?

Does an embedded librarian or an information center offer customized service to establish, manage, and periodically review a set of current awareness sources?

Does an embedded librarian or an information center monitor the media and post a daily collection of items of general interest (“what you might want to know about today”)?

The implication for information professionals, of course, is that we need to show up at just the right moment with something bang-on relevant to what the client is in the middle of doing. That in turn means, of course, that we need to be on top of what they are doing … so as to become the “human Googles” they need us to be.

## 7.5 How well are internal tools supporting employees?

With the rapid evolution of information technology—not to mention senior management’s understanding that good information and communication tools are competitive edges—the suite of tools used by knowledge workers is a key component in their ability to deliver quality work. Information professionals have opportunities to raise it with appropriate personnel when they hear employees speak about those tools, and questions like the following should be top of mind:

- Are internal tools—intranets, document repositories, business intelligence feeds, and the like—effective and helpful? Are they intuitive and productive in terms of the time it takes to find needed material?
- Conversely, has content proliferation over time made the tools so cumbersome and confusing that employees abandon them in favor of “asking around”?
- Are there mechanisms for allowing users’ suggestions to be implemented for improvement? Are occasional spot checks performed to track the need for revisions?
- Are targeted instructional videos or other help items available for employees to get oriented how to use the tools?
- Do corporate branding policies get in the way of employees’ convenience in finding what they need?

## 7.6 What is the corporate culture for proposals and business cases?

Unlike such must-haves as technology security, competitive security, and compliance with the law, information and knowledge management may not be compelling at budget time. How can information professionals contribute to making the case for investing in tools and personnel for the latter? The following scenarios are illustrative of opportunities for information professionals to identify, propose, and lead projects that will reward the organization in the long run:
• **Silos leading to wheel reinvention**: When it comes to light (possibly through proactive inquiry as to what the business teams are doing) that several teams are engaged in similar projects … how does such a discovery translate into concrete remedial action?

• **Retirement**: If business teams are repeating earlier work because lessons learned from previous efforts were not identified in a timely manner (before the relevant person or persons retired) … how does such a discovery translate into a productive strategy?

• **Geography**: When teams are spread over many locations and therefore lack the natural ability to “bump into each other at the cafeteria” … how can information as to their projects be shared without becoming “noise”?

• **Information object proliferation**: What steps are being taken to deal with the proliferation of documents, presentations, videos, etc. on shared drives and on personal devices?

• **Organic growth gone wild**: If the organization and navigation of a central tool such as an intranet has become less than friendly and intuitive over time due to the constant bolting on of new content, what is the solution?

• **Bibles**: Do customer facing employees have “bibles” of correct information to give out in response to inquiries? Is there a convenient process for adding to such bibles when new discoveries are made?

• **Personal interaction**: Do people in fact prefer to get information from a trusted person rather than from a database? In some organizational cultures, obtaining information from a trusted colleague is preferred over obtaining it from an impersonal source—regardless how authoritative that impersonal source may be. Story telling is a popular topic at conferences, and it is understandable that there is comfort in hearing information from someone we consider to be an expert and someone we know would not go with less than solid information: “If Anna relies on that number, so can I.” How might we support information sharing through facilitating personal contact?

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**It’s Never Too Soon to Add a Librarian**

“*How should I advise the owner of a start-up company about information support?*”

Here’s a synopsis of the typical scenario I would pose, having encountered variations on the theme over many years:

Among individuals in a small team working closely together, interaction is immediate and corporate memory is fresh and readily available, just as physical information objects are but a door knock away from anyone else (“sure, I have that report right here”).

As the team grows and the volume of accumulated documentation does too, signs begin to appear that information objects—physical or virtual—present a challenge. (“*Who has a copy of … ? Where is the market study we purchased last month? Which of these versions of the project report is the official one?*”) People discover they are spending unjustifiable amounts of time hunting for documents and presentations; the volume of material held in shared drives or intranet collections proliferates past the point of utility; and “we can’t find things” becomes a common complaint.

It gets worse when work is repeated or unnecessary work is done because the memory and evidence of previous relevant efforts can’t be found. When management begins looking for a solution, it is often discovered how complex a task it is to address the accumulated backlog of information and at the same time put in place appropriate information related practices for the future.

It is never too soon to plan for the safeguarding and permanent future accessibility of the knowledge invested and developed as the organization grows. And there’s a bonus: In addition to their expertise in information and knowledge management, information professionals offer a wide range of skills highly relevant for any entrepreneurial venture.
Information professionals have an unparalleled opportunity to become treasured employees through applying their unique information lens to what they see going on around them and raising the related concerns or new possibilities. As we will discuss in the next chapter, that opportunity is associated with another characteristic of organizational life: Communications.

►►► WHAT DO YOU THINK, OSCAR AND LAURA?
Oscar heads up the customer call center for a retail enterprise. Laura is the senior executive assistant to its CEO.

**Oscar:** All these examples cement my sense that we are lucky to be working in an organization that values good knowledge management. I always look for ways to turn the “data of the day” into a win-win for the company. It’s that old “the second time you hear it, it’s a coincidence and the seventh time, it’s a trend.” I’m inspired to continue looking for opportunities to contribute to the success of the company.

**Laura:** I constantly come across situations where the information professional in me goes “that was a close call—good thing I happened to see that” or “perfect—what a beautiful example of teamwork.” I’m always looking at my work from the point of view of the role I can play in making sure we capture and hold on to information and use it. It is my job to ensure the CEO doesn’t miss a thing—I’m talking about market and industry information as well as operational information—so I look at myself as a one-person knowledge management department.

**Oscar:** I think we are both in a position to do what I call “look, listen, interpret, and convey.” I pore over the customer call reports and talk to the agents every day to get a sense of any pattern needing attention. In fact, I’m glad I instituted the once-a-day quick chat routine. The agents know that I will be by their desks every day, and it’s amazing what I learn when they share their impressions and thoughts. I humbly think my shop is an industry leader in picking up on early signals from the market for that very reason. I don’t believe the agents would necessarily feed me their stories if I hadn’t made it so easy for them to do so. In fact, I found out to my horror early on that several of the agents were afraid to bother me! I straightened that out in a hurry—we are in the business of paying attention to minute detail and small deviations from typical patterns.

**Laura:** Too true—that’s why I’m proud of my role as a conveyor belt of insight coming from employees to the CEO’s office. I have many reasons to be in touch with the VPs and managers, and I strive to find out as much as I can from them about how things are going. That way, I can alert the CEO to areas of opportunity, and I get to put the managers in touch with each other if I discover they are having similar challenges.

Do you have examples how your information background and your special attention to knowledge management made a positive impact where you work?
Laura: My favorite example involves a little something I took upon myself. I found out from a couple of IT people I was having coffee with that when an employee leaves, his or her computer is wiped clean. Not only that, they told me, the office or cubicle is cleared of printed materials. My reaction was, “oh, talk about losing documents that might have been very valuable to the successor.” Surely, I felt, there would be benefit in having a knowledgeable colleague go through the computer to rescue draft documents and presentations of potential value and to eyeball the office contents before taking them to the shredder. I’m lucky that I have the ear of the person at the top who is able to issue direction with respect to such processes, and my suggested policy was soon made official. I smile knowingly every time I hear how a new employee gush how some binder or file from the previous incumbent was gold for getting started in the new job.

Oscar: The agents just casually mentioned how useful it was for them to be able to go into the “product room” to physically look at the particular product the callers were calling about—for example, if the caller was saying something about the bottle cap being difficult to remove, they could see for themselves what kind of cap it was. Actually, the agents have been quite the source of ingenious suggestions for product and packaging improvements—for example, “I see what the caller means. If I were designing that bottle, I’d make the cap a lot wider.” But I digress. I began thinking about the product room from the point of view of the time it takes to stock it and keep it in sync with the actual products out there in the stores. Suddenly it occurred to me that the agents have to put the caller on hold to get up and walk to the product room … eureka! I conceived the idea of a virtual product room—a database of images so the agents could see each product and its packaging from every angle. We get the images from the design people, and it’s a snap to zoom the pictures on the screen so we can see the ingredient list, the weight or volume, etc. No more putting the callers on hold … and what do you know, even that small savings of time from not having to walk away from the desk has resulted in a nice productivity boost from the average call length going down slightly.

Your jobs are unusual for information professionals. Do you regret having diverged from the kind of career you might have expected when you were in graduate school?

Laura: Never. My work is challenging and hectic at times, but I take great satisfaction in being able to leverage my information skills. For example, when I started working for the CEO, I noticed how many reports were arriving from the VPs—sales reports, forecasts, research reports, product proposals, you name it. They were all differently formatted, and I somewhat pitied the CEO having to go through all that material. It kept nagging me—that had to be some way to make it easier to take in the key points of each report. Once I understood the nature of what was in each document, I began playing around with a “cover template”—a dashboard type one-pager to highlight key numbers and trends and distill the major points being made. Then I met with each VP to show him or her what I meant, and together we further refined the template. I’m proud to say that every
report the CEO gets has such a cover template, and I have been well rewarded for coming up with the idea. In fact, the VPs adopted the practice, so now it’s company wide.

**Oscar:** Are you kidding? This is a dream job I could never have imagined back in school. I do get to apply my information credentials when I analyze the data our system spits out, and I enjoy playing detective when something puzzling comes up. For example, why all of a sudden are we getting a spike in calls about product X from a certain region of the country? Is there something wrong with the product? No—as it turns out, that region was experiencing a particularly hot and humid spell, and customers were wondering if they could still use it even if it had clumped. What with the climate getting ever more extreme, I asked the product people whether it might be an idea to add to the packaging a sentence to the effect that humidity and high temperatures might cause some coagulation in the product with no impact on its use. They’re thinking about it.

What would you tell the students in your local information faculty if you were in front of them right now?

**Oscar:** Folks, there’s life beyond the library!

**Laura:** And a good one, at that!