

AS 5037—2005

Knowledge management - a guide

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This Standard was published on 10 October 2005.

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Australian Standard™

Knowledge management – a guide

Originated as HB 275—2001.
Revised and redesignated as AS 5037(Int)—2003.
Second edition 2005.

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Published by Standards Australia, GPO Box 476, Sydney, NSW 2001, Australia

ISBN 0 7337 6930 6

Preface

This Standard was prepared by Standards Australia Committee MB-007, Knowledge Management to supersede AS 5037(Int)—2003.

The objectives of this Standard are to:

- provide an easy-to-read, non-prescriptive guide on knowledge management;
- help individuals and organisations deepen their understanding of knowledge management concepts;
- assist organisations to understand the environment best suited for enabling knowledge activities; and
- offer a scalable and flexible framework for designing, planning, implementing and assessing knowledge interventions that respond to an organisation's environment and state of readiness.

The Standard has been developed for professionals who have either recently encountered knowledge management or who are looking for further guidance.

This revision incorporates insights gained as a result of feedback and consultation on the Interim Standard, which was issued in February 2003. The Committee acknowledges the many Australian and international knowledge management practitioners who commented on the Interim Standard. All suggestions received were considered and many of them have been incorporated into this Standard.

The major changes in this revision are:

- an increased emphasis on how to understand whether an organisation is ready to adopt and/or expand knowledge management activities;
- a recognition that organisations are knowledge ecosystems – a complex set of relationships existing between people, process, technology and content;
- detailed guidance on how to implement the Standard within the context of an organisation's environment; and
- emerging issues and trends in knowledge management.

The implementation of knowledge management is context dependent and the field is continuing to evolve. This Standard identifies some of the major trends currently emerging.

The knowledge management field has adopted its own language and metaphors and many of these are used in this Standard.

Breakout boxes containing guidance, stories from practice and key learnings are provided throughout the Standard to enhance an understanding of concepts discussed.

A different style and language has been used in this Standard when compared to other Australian Standards. This is due to the objectives of this Standard and the need to reflect the knowledge management area of practice.

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Foreword

The transition into the knowledge era means that knowledge has become the major asset and capability for contemporary organisations.

Organisations face a hyper-connected, competitive and constantly shifting environment. Within this environment, Australia has witnessed many changes over the last forty years, including deregulation, microeconomic reform, increased globalisation and the rise of computerisation. The knowledge-based services sector is now a key driver of national wealth. There is growing recognition that knowledge and the ability of an organisation to learn, innovate and adapt contributes significantly towards organisational strength and survival. Knowledge and related intangibles are increasingly viewed as fundamental to organisational success, whether in the public, private or not-for-profit sectors.

To understand and deal with these changes, knowledge management promises deeper insights into an organisation as a knowledge ecosystem, together with greater impact on how the organisation responds to, innovates and learns from aspects of its environment. Knowledge management recognises the uniqueness of organisations in terms of strategic intent, context, capability and culture.

Knowledge management has emerged from a variety of other disciplines. Its foundations lie in the management of explicit knowledge including information, documents and records as well as the management of tacit knowledge including networks, skills transfer and learning. Its strength lies in its power to combine the organisational elements of people, process, technology and content into a coherent approach to address gaps in organisational capability.

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1 Scope and general

1.1 Scope

This Standard provides guidance on what knowledge management is and how it may be implemented using a flexible framework. The Committee encourages organisations to develop their own shared understanding and/or definitions that are suitable and applicable to their context. This Standard can be used by any individual, community or organisation that requires an understanding of knowledge management and its implementation.

1.2 Referenced documents

The following documents are referred to in the body of this Standard:

AS 5090	<i>Work process analysis for record keeping</i>
AS ISO 15489.1	<i>Records management, Part 1: General</i>
AS ISO 15489.2	<i>Records management, Part 2: Guidelines</i>
HB 189	<i>Knowledge management terminology and readings – An Australian Guide</i>
BS PD 7502	<i>Guide to measurements in knowledge management</i>
ISO 2788	<i>Documentation; guidelines for the establishment and development of monolingual thesauri</i>

Additional references are provided in Appendix C.

1.3 Definitions

For the purposes of this Standard the following definitions apply.

1.3.1 Data

Any manifestation in the environment, which may include symbolic representations that, in combination, may form the basis of information.

1.3.2 Enablers

Specific tools, techniques and activities through which knowledge management is implemented in an operational environment.

Enablers can help remedy weaknesses in an organisation's knowledge environment and also strengthen existing knowledge capabilities.

1.3.3 Information

Data in a context to which meaning has been attributed.

1.3.4 Knowledge

A body of understanding and skills that is constructed by people and increased through interaction with other people and with information.

The literature is replete with many contested definitions of knowledge. There is no single agreed definition of knowledge or one unifying theory of knowledge management.

Knowledge has many facets:

- It can be highly personal and subconsciously understood. Knowledge resides in a person's mind and may include aspects of culture or 'ways of doing things' (often referred to as tacit knowledge).
- It can be recorded as information in a document, image, film clip or some other medium.
- It can be considered as a component of an organisation's asset base.

1.3.5 Knowledge ecosystem

An ecosystem is characterised by dynamic relationships; connected networks; internal process, content and technology. An ecosystem does not follow a traditional hierarchical model. A knowledge ecosystem uses this complex environment to share, build on and apply knowledge.

1.3.6 Knowledge intervention

The use of enablers, either individually or collectively, to implement knowledge management.

NOTE: Knowledge interventions are also referred to as knowledge activities.

1.3.7 Knowledge management

A trans-disciplinary approach to improving organisational outcomes and learning, through maximising the use of knowledge. It involves the design, implementation and review of social and technological activities and processes to improve the creating, sharing, and applying or using of knowledge.

Knowledge management is concerned with innovation and sharing behaviours, managing complexity and ambiguity through knowledge networks and connections, exploring smart processes, and deploying people-centric technologies.

1.3.8 Organisation

A group, team, business unit, department, community, government, charity, sports club, or any other for-profit or not-for-profit collective or network that may take part in knowledge management. An organisation exists so that a human system can achieve, collectively, more complicated tasks and knowledge-based activities.

2 Introducing the concepts

2.1 Introduction

Organisations are being challenged on how best to leverage their people and knowledge resources in an increasingly complex world.

Examples of such challenges are:

- An established organisation exposed to major structural change or reform and searching for new ways to adapt operationally and innovate.
- An existing organisation with well-networked members but hindered by low levels of knowledge sharing.
- A domestic organisation looking to operate internationally and faced with strong regional competition.
- A new organisation with highly knowledgeable staff that lack trust or cohesive networks between them.
- A mature organisation facing major demographic change and seeking to retain its corporate memory.
- An existing organisation with a well-developed culture of knowledge sharing and well-networked team members looking to raise their performance to the next level.

Organisations that foster efficient knowledge networks and connections, explore processes and deploy people-centric technology have started to manage the complexity and ambiguity that permeates the knowledge ecosystem. This ecosystem is characterised by the pathways and connections between people, process, technology and content, which results in a rich web of relationships and interactions.

2.2 Using this Standard

This Standard will walk you through the steps and implementation options for knowledge management to suit the unique requirements of your organisation's context, capabilities and readiness. It describes a range of enablers (tools, techniques and activities) that can be used to implement knowledge management. Any organisation or individual can benefit from the approach outlined in this Standard.

Any or all of the following may influence an organisation's receptivity to knowledge management:

- strategic intent, business aims and competitive positioning;
- culture;
- external environment;
- innovativeness;
- ability to adapt and respond to a constantly shifting business environment; and
- existing information infrastructure.

These factors, among others, will be discussed throughout the Standard. An understanding of these factors will assist you in tailoring knowledge initiatives to suit a particular context and environment.

This Standard has adopted a knowledge ecosystem model. A knowledge ecosystem is characterised by dynamic relationships; connected networks; and internal process, content and technology. An ecosystem does not follow a traditional hierarchical model.

An understanding of this model will provide your organisation with the sensitivity to realise that knowledge flows within these networks, pathways and relationships.

The key feature of this Standard is the suggested Map/Build/Operationalise cycle outlined in Sections 3 – 5. This cycle provides a generic, scaleable approach to incremental knowledge interventions.

Section 6 introduces you to enablers – tools, techniques and activities used in knowledge interventions to implement knowledge management.

Measuring and evaluating the effectiveness of knowledge management remains an unsettled area. Section 7 will provide you with an overview of the different points of focus you can employ to 'take the pulse' of knowledge activities or interventions.

In Section 8, some of the theoretical underpinnings of knowledge management are discussed, along with an exploration of potential trends appearing on the horizon. Complexity theory is acknowledged as having an increasing influence on the organisational environment, along with cultural issues and smarter technology e.g. intelligent search engines, collaboration tools etc. This Section is not an exhaustive analysis of future trends nor is it intended to outline 'set in stone' predictions. Rather, it is intended to spark your thinking.

Appendix A provides information about areas of practice related to knowledge management.

Appendix B provides examples of job descriptions for knowledge management roles that can be customised to the requirements of your organisation.

International standards bodies, Governments, global organisations and professional associations have all explored the concept of knowledge management. The Committee referred to these various publications during the development of this Standard. A sample list of publications and pronouncements on knowledge management topics from both Australia and internationally is included in Appendix C.

The outline in Figure 1 assists you in navigating this Standard.

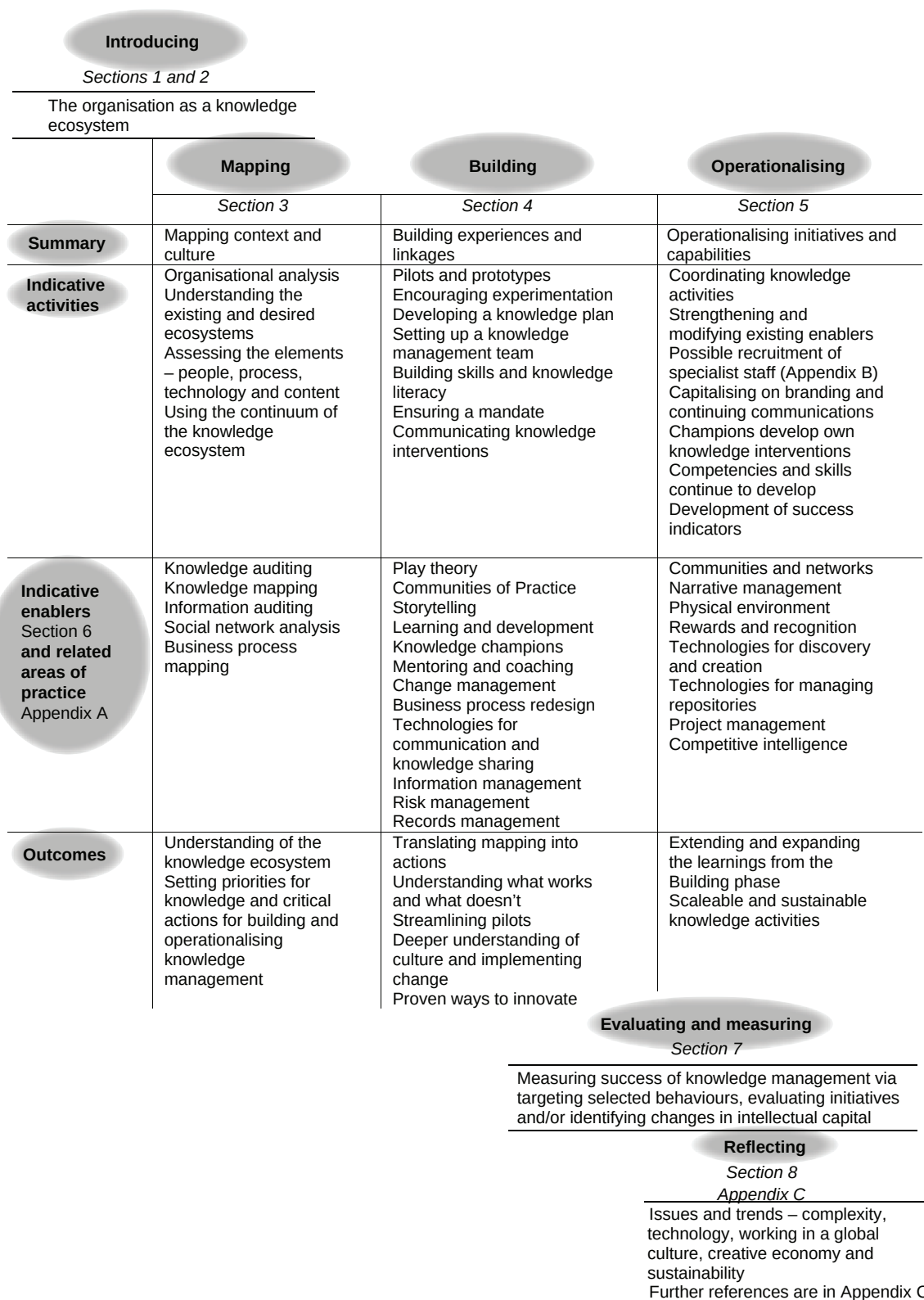


FIGURE 1 OUTLINE OF THIS STANDARD

2.3 The knowledge lens

Implementing knowledge management involves looking at the organisation through the 'knowledge lens'. There are many ways to 'look at' an organisation and its environment.

FROM PRACTICE...

The Managing Director of a large firm has just resigned. This event can be viewed from a number of perspectives (or 'lenses').

- Technology lens – Confirm finish date and ensure that all passwords and system accesses are restricted.
- Finance lens – Prepare final pay and ensure cash level is sufficient for payment.
- Human resources lens – Consider exit interview and prepare recruiting process for replacement.

Knowledge lens – A potential 'knowledge loss' and/or acquisition of new knowledge with the replacement and an opportunity to learn from the departing staff member.

The 'knowledge lens' is an expanded and holistic way of viewing an organisation by considering all the components of the ecosystem and the knowledge needed to achieve strategic intent. By applying the 'knowledge lens' to these components, we can view them from a different perspective. Further, we can see actual and potential links and relationships that perhaps were not previously evident.

2.4 The organisation as a knowledge ecosystem

In the knowledge era, an organisation can be considered an ecosystem that consists of a complex set of interactions between people, process, technology and content. In this ecosystem, there is a path from information to knowledge to value, through use by individuals or groups of individuals. Unlike the industrial management model of people behaving as commodities in a command and control environment, the knowledge-enabled organisation considers people and their knowledge as a primary asset.

The ecosystem within an organisation can be viewed through the knowledge lens. Figure 2 shows the knowledge ecosystem.



FIGURE 2 THE KNOWLEDGE ECOSYSTEM

The core of the knowledge ecosystem is organisational outcomes. These outcomes flow from the contextual environment (culture and strategic intent) and the manner in which an organisation operates within the external environment. A major aim of knowledge management is to stimulate and enhance collective organisational skills and competencies. Working within a knowledge ecosystem first requires a deep understanding of why knowledge management should be implemented and where in the organisation the initiative should start.

It is important not to start simply at the outer ring, for example, with intranet building. Technology and content that is devoid of context will not deliver a holistic knowledge initiative. You must also consider what linkages people and processes have with content; how people use technology in the organisation; and how you can use other knowledge activities, such as storytelling, to build an adaptive and sustainable knowledge environment.

The specific components in the knowledge ecosystem include the following:

- Organisational Outcomes – objectives that focus on creating an innovative and adaptive organisation.
- Culture – the combination of an organisation's skills and competencies with the collective behaviours and values which, in total, must be understood before embarking on any knowledge intervention.

- **Context and Strategic Intent** – knowledge is shaped by organisational context and strategic intent. Both context and intent differ in every organisation. A knowledge intervention must be informed by this context and align with strategic intent. Ultimately, knowledge management has the ability to drive strategic intent and alter the organisational context.
- **Drivers** – these focus knowledge management and are an incentive for change and/or evolution within the knowledge ecosystem. Refer to Figure 4 for examples of drivers.
- **Elements** – the four elements are people; process; technology; and content. These elements exist in all organisations. Over-emphasising one or more elements at the expense of others may result in your knowledge interventions having less impact than an approach which sought a balance between the elements (given the context of the organisation).

For example, the right mix of skilful people in conjunction with integrated technology, smart processes and high quality content result in a balanced knowledge management approach that supports desired organisational outcomes.

- **Enablers** – specific activities, tools or techniques that populate the ecosystem. How you mix and match enablers depends on organisational capability, culture, context and strategic intent. Enablers are further discussed in Section 6.
- **Networks and Communities** – are social configurations that are voluntary, self-organising, and sense-making entities. They adopt common practices, tools, symbols, signs, artefacts, stories and histories as they mature and evolve. Knowledge flows between people and surfaces in conversations, discussions and interactions.
- **Champions and advocates** – they actively promote knowledge activities, their adoption and use. They provide guidance, feedback, visibility, legitimacy and, in some cases, resources for knowledge activities to flourish and deliver results to the organisation.

There is no 'one size fits all' approach. Your challenge is to fully understand the context in which knowledge management is to be implemented and select a variety of enablers to stimulate and evolve the knowledge ecosystem by applying the Map/Build/Operationalise cycle that is discussed in Section 2.5.

2.5 Understanding the map/build/operationalise cycle

Now that we have viewed the organisation through a knowledge lens and explored the knowledge ecosystem, we can look at a framework for implementing knowledge interventions within the ecosystem. Figure 3 shows this framework.

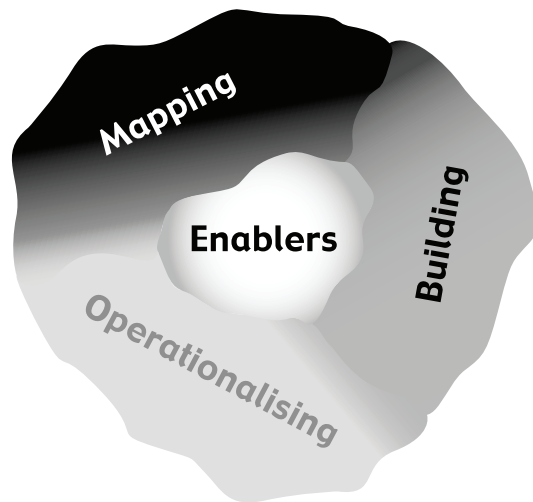


FIGURE 3 THE MAP/BUILD/OPERATIONALISE CYCLE

This framework is a non-linear, cyclical flow where each stage can be visited or revisited according to the demands and needs of your organisation. Critical to the cycle is the use of enablers to support the phases.

The phases are:

- Mapping context and culture – focuses on charting the context for knowledge management. This phase encourages you to investigate and analyse the knowledge ecosystem. Mapping context and culture is outlined in Section 3.
- Building experiences and linkages – examines how you can encourage your organisation to experiment with new ideas and pilot knowledge interventions. This phase focuses on building experience and linkages between people, process, technology and content. Building experiences and linkages is described in Section 4.
- Operationalising initiatives and capabilities – the focus in this phase shifts from experimenting and building to implementing and operationalising. Operationalising, for example, may involve moving discrete pilots out into the wider operational environment. Operationalising initiatives and capabilities is discussed in Section 5.

The centre of the cycle, as shown in Figure 3, contains the enablers that are used in all phases of the Map/Build/Operationalise cycle.

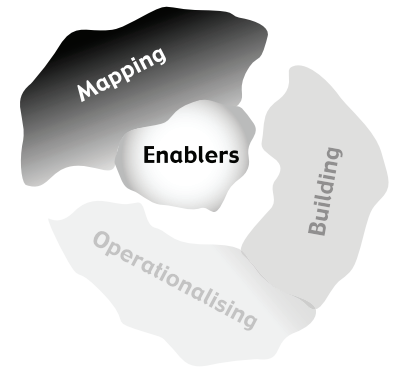
While there are varying activities and understandings required for each phase, there are common characteristics of the cycle:

- the organisation's state of knowledge readiness;
- the scalability of the phases of the cycle;
- the building of long-term, sustainable organisational capability through understanding and responding to the knowledge ecosystem; and
- the ongoing and continuous nature of the phases.

KEY LEARNINGS

- (1) The knowledge lens gives new or different viewpoints of your organisation and provides the catalyst for initiating knowledge management.
- (2) Organisations form part of a knowledge ecosystem – a rich web of relationships, pathways and interactions.
- (3) Enablers populate the knowledge ecosystem.
- (4) The map/build/operationalise cycle is a framework you can use to implement knowledge interventions.

3 Mapping context and culture



3.1 Introducing the mapping phase

The Mapping phase of the cycle focuses on charting the context for knowledge management. This phase is crucial and allows you to investigate and better understand the knowledge ecosystem. A vision for what knowledge management means for the organisation should be articulated to help drive change and generate enthusiasm among key stakeholders.

In this phase, you consider the organisation's knowledge ecosystem and ask what knowledge – in terms of people, process, technology and content – will enable it to identify knowledge gaps and achieve its strategic intent.

The Mapping phase can either scale across:

- the whole organisation /enterprise;
- a particular business process or processes, such as project or risk management; or
- a one-off intervention targeted to a specific work area.

The scope of your efforts will depend on the support for knowledge management within your organisation and the perceived need for it. The Mapping phase should reflect the likely scale of knowledge management in your organisation, for example, whether it is a whole of organisation approach or initially targeted at a particular section, branch or work area.

The challenge is to identify where to focus your short and long term efforts. There are four questions to ask and answer:

- (i) Where are we and where do we want to be? Mapping starts with an understanding of the organisational context and strategic intent.
- (ii) What is the current state of the knowledge ecosystem? This requires mapping and assessing the existing knowledge environment, including the organisational culture.

- (iii) Where do we need the organisation to be? Following from this, what should be the desired state of the knowledge ecosystem? Does your new understanding of the knowledge ecosystem require a revision of the role of your organisation? What is the desired state of the future knowledge ecosystem?
- (iv) What is the gap between the existing and desired state of the knowledge ecosystem? What is the best way to move forward?

Since knowledge management is not a 'one size fits all' proposition, the answers to these questions will differ between organisations. The Mapping phase looks at both the current and desired state of the knowledge ecosystem and helps to develop contexts for change.

3.2 How to start

The central core of the knowledge ecosystem model (see Figure 2) focuses on organisational outcomes. Understanding the context of your organisation and the nature of its environment is the first step towards building a picture of opportunities and constraints for activating knowledge.

Some of the key questions you need to explore are:

- What is the nature of the organisation? Is it public, private, community, for profit or non-profit?
- What regulatory framework impacts on your organisation? E.g. Copyright, Privacy, Intellectual Property, Corporate Governance, Records Management and Freedom of Information.
- What is the formal and informal structure? Does the organisational chart truly reflect the informal (or shadow) organisation and its relationships?
- What are the organisational value statements and ethics?
- What are the interests of partners, politicians, consumers, shareholders and other stakeholders?
- What are the identified strengths and weaknesses of competitors (both direct and indirect)?
- What are the relevant industry and political trends and developments?
- Are there alternate operational models used in the industry?
- What are the relevant political and policy influences on the sector?
- What are the effects of globalisation and technological change?

The strategic intent of the organisation helps to answer the question of 'where are we and where do we want to be' (see Section 3.1). By analysing the strategic context, you can begin to identify the relevant drivers for your knowledge efforts. Drivers act as pointers or indicators towards what knowledge should be developed or leveraged and will help guide and focus knowledge interventions.

The challenge is to seek an understanding of the implications of the strategic context for knowledge interventions. Starting points for the analysis may include:

- What is the strategic intent of the organisation, its vision, mission, goals and action plans?
- What is the organisation trying to achieve, what is the time frame and who is involved? SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) and scenario planning may be useful tools.
- How does senior management articulate strategic intent?

By understanding the organisational context and strategic intent, external pressures or drivers can be identified and understood. By viewing drivers through the 'knowledge lens', you can start to acquire knowledge about these drivers and their impact on the knowledge ecosystem, including constraints.

Figure 4 lists some examples of drivers and their implication for the organisation and the knowledge ecosystem.

Drivers	An example within an organisation	Example of the implication for the knowledge ecosystem
Competitive pressures	There is a limited understanding of the competitive marketplace to inform strategic planning	Active knowledge acquisition about competitors, both direct and indirect
Customer service	The organisation requires the highest standard of customer/ client services	Effective and coordinated flows of knowledge about customers/ clients to key operational units
Legislative requirements	Government body requires regular reporting to regulatory authority	Processes for tracking and reporting key corporate knowledge
Operational effectiveness	Evidence of fragmented business processes and duplication of effort in key processes	Analysis of the current knowledge resources and flows
Risk management	There is a planned restructure of departments	Address loss of corporate knowledge assets
Others... (relevant to your organisation)	New product design is a strategic goal for the next two years	New ideas and innovations are communicated across the organisation

FIGURE 4 DRIVERS

3.3 Existing knowledge ecosystem

Organisations can concentrate mapping efforts on the whole organisation, a work area or a business process.

By using the 'knowledge lens' and looking at people, process, technology and content, you gain a better understanding of current knowledge by exploring:

- Who knows what.
- How knowledge flows are shared.
- Where knowledge is created and who creates it.
- What knowledge is being used and who is using it.
- Why knowledge is valuable to the organisation.

When considering these questions, it is important for you to also identify aspects of organisational culture that shape thinking, behaviour and perceptions of individuals and groups.

It is useful to investigate the related areas of practice (identified in Appendix A) present in your organisation and the work they are doing. Consider their potential for leveraging the skills, initiatives and practices of these areas to support a knowledge activity.

You can use a number of different enablers to assist in answering these and related questions. The outcome of employing various tools and techniques is a snapshot of existing knowledge and how knowledge flows via relationships between people in the knowledge ecosystem.

Some of these enablers are:

- knowledge auditing;
- information auditing;
- knowledge mapping; and
- social network analysis.

Social network analysis particularly will help to surface the hidden or 'shadow' knowledge flows within your organisation. These flows will often run counter to those shown in organisational charts where knowledge and communication is usually depicted as flowing in a top-down direction. These techniques are described more fully in Section 6.

FROM PRACTICE...

An SME that designs and exports surf and leisure products wanted to better leverage its knowledge assets to create innovative new products (strategic driver is innovation).

The company, as part of the mapping phase, conducted a knowledge audit of its product design process. This identified knowledge and expertise that underpinned each stage of the process. By identifying critical knowledge gaps in the product design process, the company was able to set an agenda for its future knowledge interventions. By identifying critical knowledge, the company was able to prioritise its knowledge activities. It was further able to identify critical actions for promoting knowledge sharing; fostering innovation and knowledge creation; and improving the management of its explicit knowledge.

Considering the state of existing knowledge in your organisation will further develop your understanding of the knowledge ecosystem and identify potential cultural barriers and constraints.

3.4 Assessing the elements

Figure 5, The Continuum of the Knowledge Ecosystem, can be used as an assessment tool to further your understanding of both the existing and desired state of the knowledge ecosystem.

Looking at where an organisation is located along the four stages of the continuum – standalone, connected, networked and adaptive – helps to clarify whether an imbalance of elements exists and identifies potential areas for improvement within the ecosystem.