

Knowledge Sharing in the Flow: Survey Results

How organizations are integrating KM into critical business processes and workflows

APQC's knowledge management (KM) experts argue that KM occurs on two levels: above and in the flow of business. "Above the flow" KM encompasses program governance and design, the implementation of KM tools and approaches, and all the work KM professionals do to ensure that knowledge can flow inside their organizations. "In the flow" KM, on the other hand, refers to employees finding and sharing knowledge as part of their work. Above the flow activities provide essential infrastructure—without them, KM would be limited to ad hoc exchanges between colleagues. However, if an organization wants employees to contribute and reuse knowledge as part of their normal routines, it must embed KM processes and tools in existing processes and workflows, rather than requiring people to stop what they're doing to share.¹

In autumn 2011, APQC conducted a survey of 84 organizations to understand the extent to which they have embedded knowledge sharing and collaboration in key business processes and workflows. Survey respondents were asked what approaches they use to embed KM in the flow and what they see as the most important ingredients for long-term success. Below are highlights from the survey and commentary on the results.²

DEMOGRAPHICS AND STRATEGIC DRIVERS

The survey respondents represent a cross section of organization sizes, industries, and KM experience levels. Eighty-four percent report that their organizations have individuals or teams dedicated to KM, but the length of time these KM programs have been in place varies widely. More than half the respondents have had dedicated KM teams for three years or more, but 24 percent either do not have such teams or have had them in place for less than one year.

Almost every industry is included in the survey group, but professional services firms form the largest segment, making up 21 percent of respondents. Other service-focused industries were also strongly represented, along with manufacturing, education, energy, financial services, and government/military.

Although it is impossible to draw conclusions based on these demographics, it is unsurprising that professional services firms are particularly interested in embedding KM in the flow of business processes and workflows. These organizations are globally dispersed and consist predominantly of knowledge workers; furthermore, their "products" are intellectual property

¹ For a more complete description of the in/above the flow concept, see [Managing Knowledge in and Above the Flow of Business](#).

² Additional information on the survey is available in [Embedding Knowledge in the Flow - November 2011 KM Community Call](#).

and expertise delivered through consulting engagements. In light of the recent recession, professional services firms are under pressure to streamline their labor costs and keep their rates competitive. Financial success depends on consultants' ability to get up to speed quickly, locate and reuse applicable content across projects, and maximize billable hours.

While the market factors driving KM's integration into business processes and workflows are particularly acute in the professional services industry, they apply to most large organizations—especially ones that require complex technical or product knowledge. When KM tools and approaches are integrated into daily work at these organizations, employees are more likely to seek and find information they can use to do their jobs better. This boosts the bottom line in countless ways, from accelerating time-to-competency for new hires to eliminating inefficiencies associated with solving the same problems over and over again.

THE EXTENT TO WHICH KM IS EMBEDDED IN THE FLOW

As shown in Figure 1, more than half the survey respondents report that their organizations have integrated KM into critical business processes and workflows at the enterprise level. While these results are impressive, the remaining 45 percent of respondents say that their KM integration is limited to specific functions or business units. These organizations stand to benefit significantly if they extend KM integration to the enterprise level.

Areas of the Organization Where KM Is Integrated with Critical Business Processes and Workflows

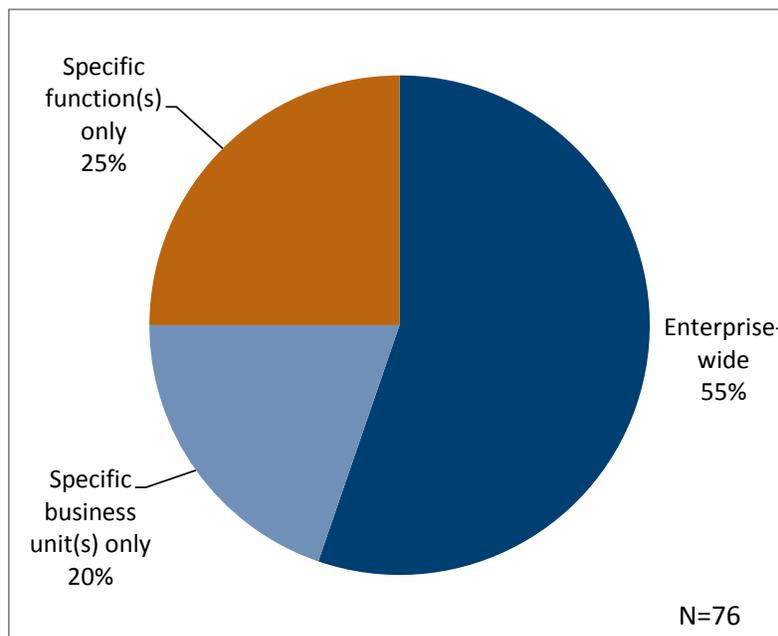


Figure 1

In addition, because the data is self-reported by the survey respondents, APQC cannot verify the full extent to which KM is embedded at organizations reporting enterprise-wide integration. It is possible that some have deployed enterprise technology tools for KM without overcoming all the structural and cultural barriers that prevent knowledge from flowing among functions and business units.

TOP APPROACHES FOR EMBEDDING KM IN THE FLOW

When asked what approaches their organizations use to integrate KM into critical business processes and workflows, the survey respondents cite numerous tactics, including workflow management software, collaboration platforms, and other high-tech solutions (Figure 2). However, the two most commonly cited approaches—lessons learned and communities of practice—are classic KM methods that have stood the test of time.

Approaches Used to Integrate KM with Critical Business Processes and Workflows

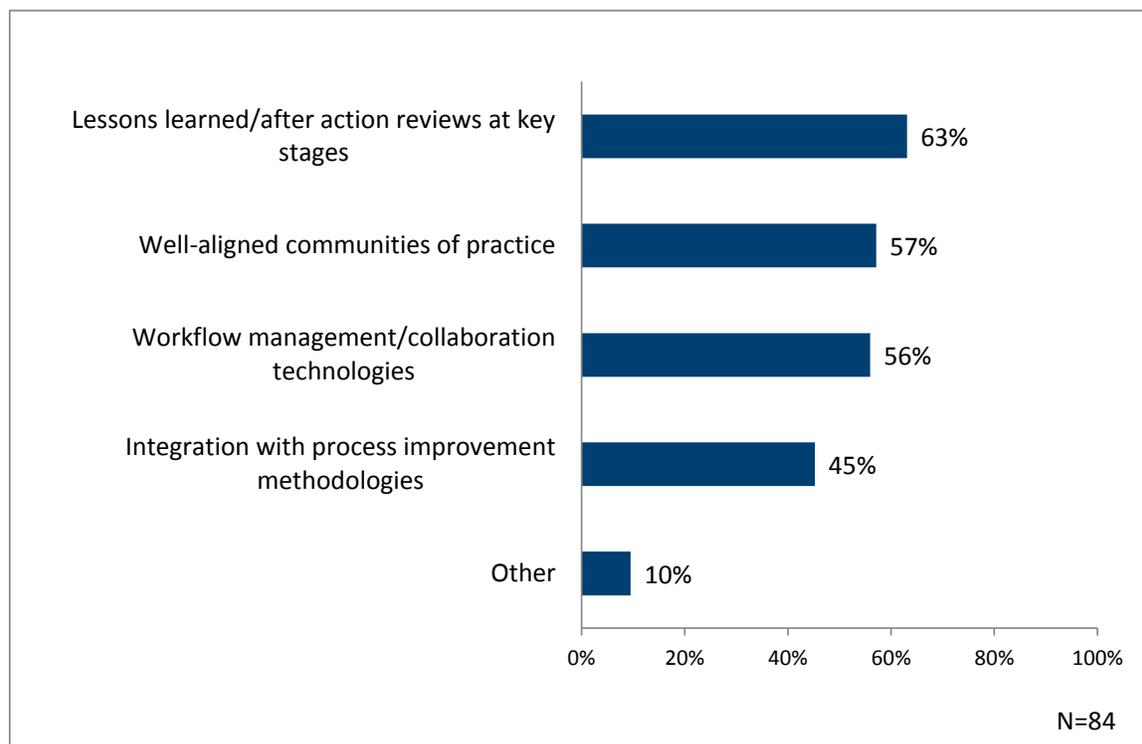


Figure 2

The most popular approach involves incorporating lessons learned or after action reviews into project and program methodologies. Many organizations capture lessons, but comparatively few have figured out how to embed lesson capture and reuse directly into the workflow. Best-

practice organizations do this by building lessons learned into every stage of project/program management, from project planning and initiation to execution, monitoring, and closeout procedures. When processes and methodologies contain explicit steps requiring participants to record and reuse lessons, these activities are seen as a core part of the work, instead of as separate add-ons. This is particularly true if employees see that the lessons they submit lead to corresponding changes in processes and doctrine when appropriate.³

The second most popular approach for integrating KM into the workflow consists of aligning communities of practice with critical business processes. Communities remain one of the most effective ways to connect employees to knowledge and one another. Best-practice organizations make their communities into one-stop shops for content and learning so that, when employees have questions or information to share, they instinctually turn to their communities.⁴

In a recent APQC study,⁵ Jim Kochan of Vitesse Solutions, a consulting firm that partnered with ConocoPhillips on its KM strategy, explained the extent to which ConocoPhillips' communities (which the organization refers to as "networks of excellence") are integrated into daily workflows: "If you feel you are taking time away from your day job to do something in a network, that's a bit like saying, 'I have to stop what I am doing so I can get on my computer.' Don't you already work on your computer? The whole idea of a network is that you are doing the same things you would normally do, but you are doing them more efficiently." At ConocoPhillips, networks are hubs where employees can find validated content, engage in peer-to-peer problem solving, share what they know, and build relationships with colleagues and experts. The networks are seamlessly connected to processes and workflows—they are where questions get answered and work gets done. For this reason, employees never feel that they have to step away from their core responsibilities to participate.

PREDICTORS OF SUCCESS

The survey respondents were also asked what they see as the best predictors of long-term success for embedding KM into critical business processes and workflows. In other words, what structural and cultural factors most support the assimilation of KM into daily work? The surveyed organizations cite numerous enablers, but the two most popular are an organizational culture conducive to KM and sufficient leadership support (Figure 3).

The respondents' emphasis on culture is consistent with every KM study APQC has conducted over the past 16 years. Organizations that excel at KM and achieve best-practice status embrace knowledge sharing as part of their enterprise visions and strategies. This results in environments

³ These best practices are derived from APQC's 2010 report [Cutting the Cost of Not Knowing: Lessons Learned Systems People Really Use](#).

⁴ This best practice is derived from APQC's 2010 report [Sustaining Effective Communities of Practice](#).

⁵ This example is derived from APQC's 2011 report [Engagement and Participation for Knowledge Sharing and Collaboration](#).

where employees at every level see KM as part of their job responsibilities and feel empowered to share what they know. When employees are trained on the importance of KM from the day they walk in the door, it is much easier to embed knowledge-sharing and collaborative behaviors in processes and workflows.⁶

The second predictor of success, senior leadership support, goes hand-in-hand with culture. Executive involvement lends credibility to the KM program and ensures that the effort will be long-term. Leading by example, executives shape the values of the organization and establish support systems to initiate and manage change. Without direction from management, KM approaches such as communities of practice and lessons learned are unlikely to align with organizational strategy and become embedded in the way the organization works. Executives ensure that a KM program exists to support the big picture.

Best Predictors of Long-Term Success in Integrating KM into Critical Business Processes and Workflows

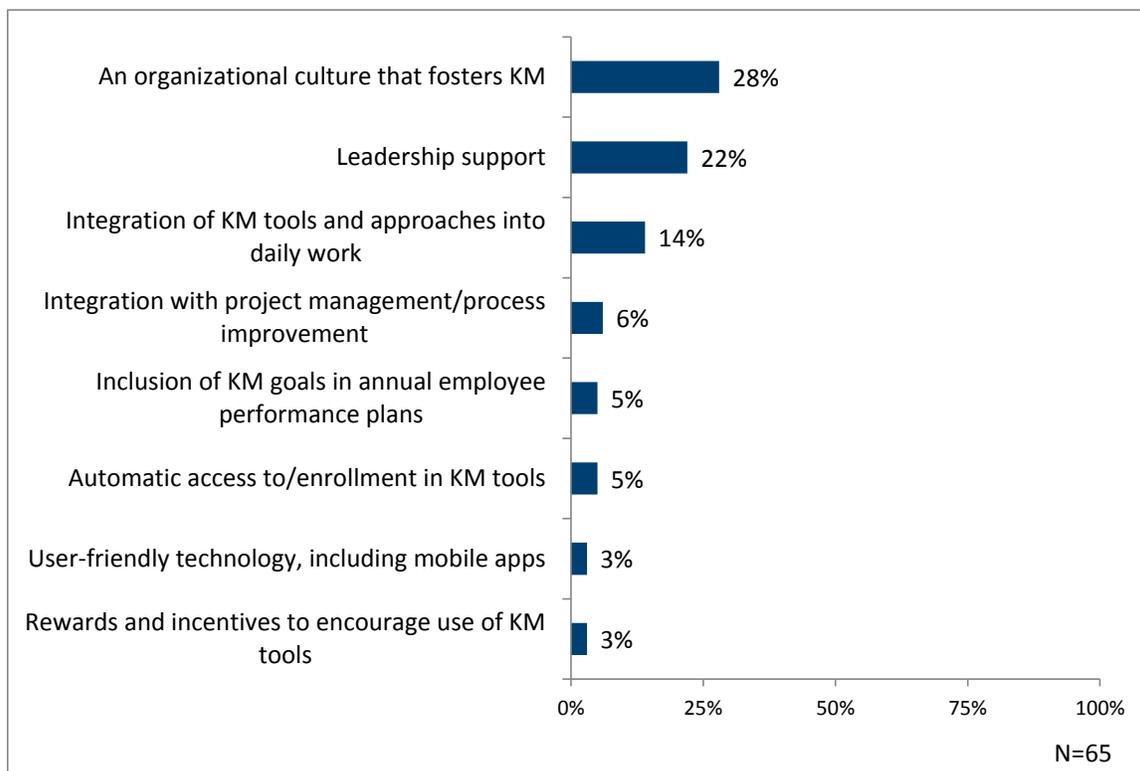


Figure 3

⁶ For additional information, see APQC's article collection [Building a Collaborative Culture in Your Organization](#).

It should be noted that some of the predictors listed in Figure 3 are linked to best practices, despite not scoring in the double digits on this survey. Many of the leading organizations APQC has studied build KM goals into annual employee performance plans, provide universal access to/enrollment in KM tools, and leverage rewards and incentives to encourage use. Some are also experimenting with mobile KM apps and other advanced technology solutions. However, without the prerequisites of a knowledge-sharing culture and senior leadership support for KM, an organization is unlikely to adopt or benefit from these more advanced practices.

CONCLUSION

Building KM and collaboration into the flow of business is a complex endeavor. For the effort to succeed, an organization must adopt an enterprise approach to KM, implement tools and approaches that align with the way employees work, and then communicate clearly about desired behaviors and expectations. And all of this must be underpinned by executive support and a culture that values teamwork and sharing.

But for organizations that have successfully embedded KM into processes and workflows, the payoff is immense. Knowledge and expertise are the fuel that drives businesses forward. When this fuel is readily available, people are more likely to find and leverage time-tested answers to their problems, instead of wasting time inventing their own solutions. Employees are more productive and feel more empowered to learn and share, quality and consistency increase, and positive innovations have a better chance of reaching the right audience. For all these reasons, APQC encourages organizations to continue to strive to integrate knowledge sharing and collaboration into the way employees work and interact enterprise-wide.

ABOUT APQC

APQC is a member-based nonprofit and one of the leading proponents of benchmarking and best practice business research. Working with more than 500 organizations worldwide in all industries, APQC focuses on providing organizations with the information they need to work smarter, faster, and with confidence. Every day we uncover the processes and practices that push organizations from good to great. Visit us at www.apqc.org and learn how you can make best practices your practices.