Remembering Lessons Learned: Knowledge Management Techniques for Building Generational Memory

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Session Outline

- The Problem – Lost Knowledge
- The Solution – Knowledge Management (KM)
- Breakout Sessions
- Possible Applications of KM
- Summary & Questions
The Problem – Lost Knowledge

NASA’s Saturn V Rocket

Stradivarius Violins


Image source: http://www.si.edu/resource/faq/nmah/stradv.htm
The Problem – Lost Knowledge

What is Lost Knowledge?

If knowledge is: “the capacity for effective action or decision making in the context of organized activity”

then lost knowledge is: “the decreased capacity for effective action or decision making in a specific organizational context”

The Problem – Lost Knowledge

- A Quick Survey
  - Has anyone retired from your workplace in the last 12 months?
  - Has anyone voluntary resigned from your workplace in the last 12 months?
The Problem – Lost Knowledge

How do we lose knowledge?

- Changing workforce demographics
- Changing nature of knowledge
- Organizational change in a turbulent environment
The Problem – Lost Knowledge

Knowledge can be lost at three levels:

- Individual
- Group
- Organizational
The Problem – Lost Knowledge

Where does organizational memory reside?

- In the minds of its employees
- In their relationships
- In repositories
- Embedded in work processes
- In product / service offerings
The Problem – Lost Knowledge

Effects of lost knowledge:
- Anticipated / unanticipated effects
- Tangible / intangible impacts
- Immediate / delayed costs

Lost knowledge can directly threaten an organization’s strategy in several ways
The Problem – Lost Knowledge

- Accenture surveyed 500 US workers between 40-50 yrs old
  - 26% - expect no knowledge transfer (KT)
  - 20% - anticipate an intensive, months-long KT process
  - 28% - expect the KT process will last a week or two
  - 16% - expect to have only informal discussions
The Solution – Knowledge Management

- What is Knowledge Management?
  - The systematic processes by which knowledge needed for an organization to succeed is created, captured, shared, and leveraged (Rumizen)
  - A set of techniques and practices that facilitate the flow of knowledge into and within the firm (Birkinshaw)
  - A fluid mix of framed experience, values, contextual information and expert insight that provides a framework for evaluating and incorporating new experiences and information (Davenport & Prusak)
The Solution – Knowledge Management

- Data, information, and knowledge
- Types of Knowledge
  - Explicit
  - Tacit
  - Implicit
KM Practices – An Overview

- Methods of transferring explicit knowledge
  - Documentation
  - Interviews
  - Training
KM Practices – An Overview

- Methods of transferring implicit and tacit knowledge
  - Storytelling
  - Mentoring / Coaching
  - After Action Reviews
  - Communities of Practice
Knowledge-focused Exit Interviews

- **What is it?**
  - In-depth, qualitative, one-to-one interviews that attempt to capture knowledge about what it takes to do the job

- **Who uses it?**
Wholesaling Urban Assistance through Municipal Development Programs

Interview with Braz Menezes by Roberto Chavez and Radha Seshagiri
edited by Deepali Tewari, January 8, 1999

Introduction

MR. CHAVEZ: Friday, January 8, 1999. Present here are Braz Menezes, Principal Operations Officer of the LAC Region of the Bank; Radha Seshagiri, consultant and Assistant Manager of the thematic group on provision of services to the urban poor; and myself, Roberto Chavez, Knowledge Management Officer in the Knowledge Management Program of the World Bank. The subject of our discussion today is the Brazil urban program, and more specifically the ten years of the Brazilian Municipal Development Program.

MR. CHAVEZ: With that introduction, Braz, could I ask you to start by telling us about how you came to be involved in the Municipal Development Program of Brazil?

MR. MENEZES: That's fairly easy. In 1987, the Bank underwent a major reorganization. Staff were moved around. We were all going to do things differently, become more responsive, get closer to the client. We were going to get away from the old ways of doing things, and so forth. The whole Bank, each region, each department, was to be restructured to better address priority sectors. I was reassigned within the Latin America and Caribbean Region, to work on Brazil, which I had visited once before in 1986.

A Period of Political Transition in Brazil

It was a bit of a shock. Our pipeline was non-existent. The Bank's Brazilian urban program had been slowing down for some time. The portfolio as a whole was not performing well. In part because Brazil was going through a fairly complex political transition back to democracy. As you probably know, Brazil had been under authoritarian rule since about 1964.

MR. CHAVEZ: Right. What was it like?

MR. MENEZES: I had only just started taking Portuguese language classes -- I was not really catching everything. There was a lot of learning to do. The powers of local authorities in Brazil had been taken away from them. Governors were appointed by the folks in Brasilia, and the governors in turn selected and appointed the mayors, who in turn implemented the regime's programs. This started to change around the late-seventies, discussions on a new Constitution had begun. There was considerable interest in reintroducing political processes. All institutions were under stress. Nobody wanted to be left out. Every segment of society, every conceivable pressure group organized itself to provide inputs into the Constitution. Later on, it turned out that the constitution got down to detailing too many issues - including rules governing public sector employment, benefits, et cetera. It basically put government in a straitjacket.
Knowledge-focused Exit Interviews @ Delta Air Lines

About Delta TechOps

Delta Air Lines has been a leader in service, innovation and technology for over 70 years. Now we offer those same qualities to customer airlines.

Delta TechOps has the infrastructure, the experience and the commitment to deliver. Our state-of-the-art facilities at nationwide locations and award-winning service groups provide assurance that you're getting the very best.

Be sure to take a look at Maintenance Services—our Airframe, Engine and Component maintenance make Delta TechOps a full-service, one-stop shop. When you find what you need, Contact us.

Your needs are the focus at Delta TechOps. Our compliance and quality assurance group can tailor the wide range of regular and specialized services they offer to meet your specific needs.
Knowledge-focused Exit Interviews @ UK Post Office Consulting

- 3E (Entry, Expert, Exit) Knowledge Interviews
- KI process follows 5 steps: pre-interview screening; interview map; main interview; analysis; outputs
Knowledge-focused Exit Interviews

- **Key Success Factors**
  - Use trained, skilled facilitators
  - Conduct interviews face-to-face
  - Implement the 3E approach
  - Use the knowledge & information you collect!
Organizational Storytelling

■ What is it?
  ● Sharing knowledge by telling organizational stories

■ How? By matching objectives to story types:
  ● Sparking Action (Springboard)
  ● Communicating who you are
  ● Transmitting values
  ● Fostering collaboration
  ● Taming the grapevine
  ● Sharing knowledge
  ● Leading people into the future
Organizational Storytelling

- **Who uses it?**
  - **World Bank**
    - Steven Denning used springboard stories to win support for KM
  - **NASA**
    - Since 2000, the JPL’s library has been hosting monthly storytelling sessions which help communicate their organizational culture
    - ASK Magazine helps project managers across NASA share lessons learned via stories
What's New?

The next JPL Story is scheduled for Thursday, October 27th, from 4-5 p.m., with Don Sweetnam, Genesis Project Manager, presenting, "Genesis - What really happened at UTTR?." Many of us are familiar with the precision delivery of the Genesis Sample Return Capsule to Earth at the Utah Test and Training Range (UTTR) on September 8, 2004, including the final seconds of a tumbling capsule plunging to the surface. This talk starts at that fateful moment and works back though time with an audio and video travelogue of the preparation and training for NASA's first sample return since Apollo. See training footage of the helicopter mid-air capture (including a rare clip of a novel technique for stowing the parafoil). Watch a small army of scientists, bending over a fractured canister with C-clamps, hack-saws, spoons and tweezers, scramble to recover and preserve the solar wind collector payload.

The JPL Library, Archives, and Records Section sponsors the monthly series "JPL Stories" - the concept is to provide an informal and experiential environment for both the storyteller and the story listeners. The stories take place in the main customer service area of the Library, which is the ideal location for the warm and friendly atmosphere it offers. The plan is to keep the program as flexible as possible and include a cross section of storytellers from the JPL community. Stories can take place in the past, present or future; they can be historical or make believe; and they can be light-hearted or serious. They're an effective way to communicate and understand an organization's culture and can help employees develop a sense of organizational identity. Stories offer an approach different from the more formal lectures, seminars and town halls we have at JPL - they offer another way to be a part of the discussion. Several stories are in the planning stage - watch for "JPL Stories" flyers, posters and announcements. If you have questions or suggestions about the JPL Story series or if you wish to participate, please contact Teresa Bailey at ext. 4-9233 or teresa.r.bailey@jpl.nasa.gov.

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<th>Story Title, Storyteller and Story Date</th>
<th>Flyer (PDF)</th>
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<td>Steve Collins / Title TBD / November 17, 2005</td>
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<td>Don Sweetnam/Genesis - What really happened at UTTR?/October 27, 2005</td>
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That's the power of stories -- changing the dynamic of situations with knowledge and understanding.

-- From ASK Talks with Dr. Gary Klein

In This Issue

The Bare Bones of Leadership
By Jessica Simmons
Sometimes one of the most simple -- and the most human way -- of keeping oneself grounded is not to lose your sense of humor.
+ Read More

Stories

A Glass Can Be Half Full -- Even in Microgravity
By Tom Sutliff
The project team's response to this challenge taught me how resilient people and projects can be when you give them the chance.
+ Read More

Resources

FROM THE APPL DIRECTOR
+ A Partnership with Universities
By Dr. Edward Hoffman

EDITOR IN CHIEF
+ A Tale of Two Houses: Building on a Foundation of Trust or Mistrust
By Dr. Alexander Lauffer

LESSONS LEARNED
+ Safety requires strict adherence to procedures. Period!
+ Search for lessons by topic

FEEDBACK
+ I enjoyed the Galileo project manager "never give up - never
After Action Reviews

- What is an AAR?
  - A discussion of a project / activity designed to help capture and share lessons learned

- The AAR is a simple process built around 4 questions:
  - What was supposed to happen?
  - What actually happened?
  - Why were there differences?
  - What can we learn from this and do differently next time?
After Action Reviews @ US Army

Disaster Preparedness and Recovery Support
Disaster Relief - AARs

CALL Homepage » Disaster Preparedness & Recovery Support

- TF Phoenix AAR, National Guard support 2004 Hurricanes - Adobe PDF
- Operation Noah - Florida Summer of Storms 11 Aug 04 - Adobe PDF
- Joint Task Force Andrew AMC AAR - HTML | MS Word
- Joint Task Force Andrew Army AAR - Adobe PDF
- Joint Task Force Andrew Command Group AAR - HTML | MS Word
- Joint Task Force Andrew Defense Coordinating Officer AAR - HTML | MS Word
- Joint Task Force Andrew Defense Executive Summary AAR - Adobe PDF
- Forces Command Hurricane Andrew Response AAR - HTML | MS Word
- Joint Task Force Andrew J-4 (Tab K) AAR - HTML | MS Word
After Action Reviews @ Harley-Davidson’s Kansas City Plant

Image source: http://www.harley-davidson.com
After Action Reviews @ BP

- BP’s holistic model of KM:
  - Learning Before – Peer Assists
  - Learning During – After Action Reviews
  - Learning After - Retrospects

Image source:
http://www.bp.com
Breakout Sessions

- Exit Interview Activity
- After Action Review Activity
- Storytelling Activity
Breakout Sessions: Exit Interview Activity

■ Form Groups of 3
  ● 1 person acts as the Employee
  ● 1 person acts as the Interviewer
  ● 1 person acts as the Note taker

■ Conduct a brief (5 minutes) Exit Interview

■ Regroup to discuss how to identify or target key personnel for Exit Interviews
Breakout Sessions: After Action Review Activity

- Individuals, or small groups from same organization
- Pick a recent event or activity to review
- Answer the 4 questions
- Then think about who could benefit from this insight
- List other activities for future AARs
Breakout Sessions: Storytelling Activity

- Whole table
- Review the list of story types
- List 3 examples / scenarios of how storytelling could be used in your own organization (library or academic staff association)
Possible Applications of KM

- For individuals
- For academic staff associations
- For libraries
- For others
Summary & Questions

- The problem
- The solution
- Possible applications
- Recommended reading
Thank You!

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