

10-Step Guide to Knowledge Capture

Purpose

Codify and document specific and analytic knowledge in a manner that others can re-use and adapt it for their specific use.

Description

Knowledge capture is a very common method of transferring knowledge. While it is often not the most effective method, it is the most visible and easy to understand. After all, libraries (real or virtual) are full of books that have contributed greatly to our base of knowledge. Many of these books are great examples of codified knowledge!

Knowledge capture is process that involves identification, elicitation, distillation, packaging and publishing. (Note: The elicitation and distillation steps are fairly complex and are available as free, downloadable companion guides to this document on www.greenesconsulting.com) It is laborious and time consuming. But, when done right, it can enable knowledge to move from one to many regardless of time and space.

Generational Aspects of Knowledge Capture

Considerations of generational learning styles have been incorporated into the following outline of steps and tasks:

- If captured knowledge and relevant content is not found on the first page of results from a Google search, a Gen Xer or Millennial will likely either stop looking or perform another search. There's a good chance they will not go to the next pages of search results to find what they are looking for.
- Millennials aren't very keen on reading long, drawn out stories that provide rich context and background to a lesson or event, whereas baby boomers are used to telling stories to help others learn from their experience. So, when harvesting knowledge from a boomer, keep your stories concise and to the point by focusing on the 2 or 3 things that they think are important. The difference between *sharing* a story and *telling* a story is important for all generations.
- Knowledge in the form of 'bit-sized chunks' or 'nuggets' have the best chance of being read and remembered by people in all generations. It's how our brain works.

Knowledge Capture Process – 10 Steps

The following steps are provided to guide knowledge harvesters through the main activities necessary to harvest and capture knowledge for re-use and adaptation by others:

1. Identify a customer for the knowledge. Have a clear customer – current or future – in mind when considering the need to capture knowledge. Who will use the knowledge, what needs will it address, and how will people access it?

2. Identify a Community of Practice relating to this subject, whether one exists or not (Note: A guide for the establishment of Knowledge Communities is available as a free download on www.greenesconsulting.com). Practitioners will be the source of the knowledge in the first place, the users of the knowledge in future, and the people who validate the captured knowledge. If the community doesn't currently exist, consider engaging people in the relevant social or personal network of the knowledge sources you intend to tap.

3. Get clear what the captured knowledge is really about. What is the scope? Knowledge that is packaged and published needs to cover a specific area of business activity or subject/domain – boundaries can provide focus.

4. Collate any existing material upon which you can base your captured knowledge and look for general guidelines. Provide some context so that people can understand the purpose and relevance of the knowledge. Are there general guidelines that you can distil out of this material?

5. Elicit knowledge from individuals, teams and groups with relevant experience. This can be accomplished through retrospective interviews of individuals, or formal learning processes and meetings designed to glean and capture lessons learned, good practices etc, from recent projects or activities or events.

6. Distil the knowledge into concise and highly relevant 'nuggets' that represent the key insights, lessons learned and practices of the knowledge sources. If multiple sources of knowledge are harvested, identify common and contending knowledge and highlight these accordingly.

7. Organize and package the knowledge with the customer in mind:

- Build a checklist or guidelines illustrated with examples and stories. These should inform the user of the knowledge:
- 'What are the questions I need to ask myself?'
- 'What are the steps that I need to take?'
- Illustrate it with examples, stories, pictures, models, quotations, video and audio clips if possible.
- Develop a process map or workflow of the knowledge, and link the specific nuggets of knowledge with the relevant process sub-processes, activities and input and output elements.
- Develop a set of questions from the knowledge and organize the distilled 'nuggets' around these. Design these questions to reflect the knowledge content that has been gleaned from the sources and to prompt the thinking of others.
- Include links to people. Create a hyperlink to the knowledge sources personal home page or e-mail address wherever you mention them in the text. Include a list

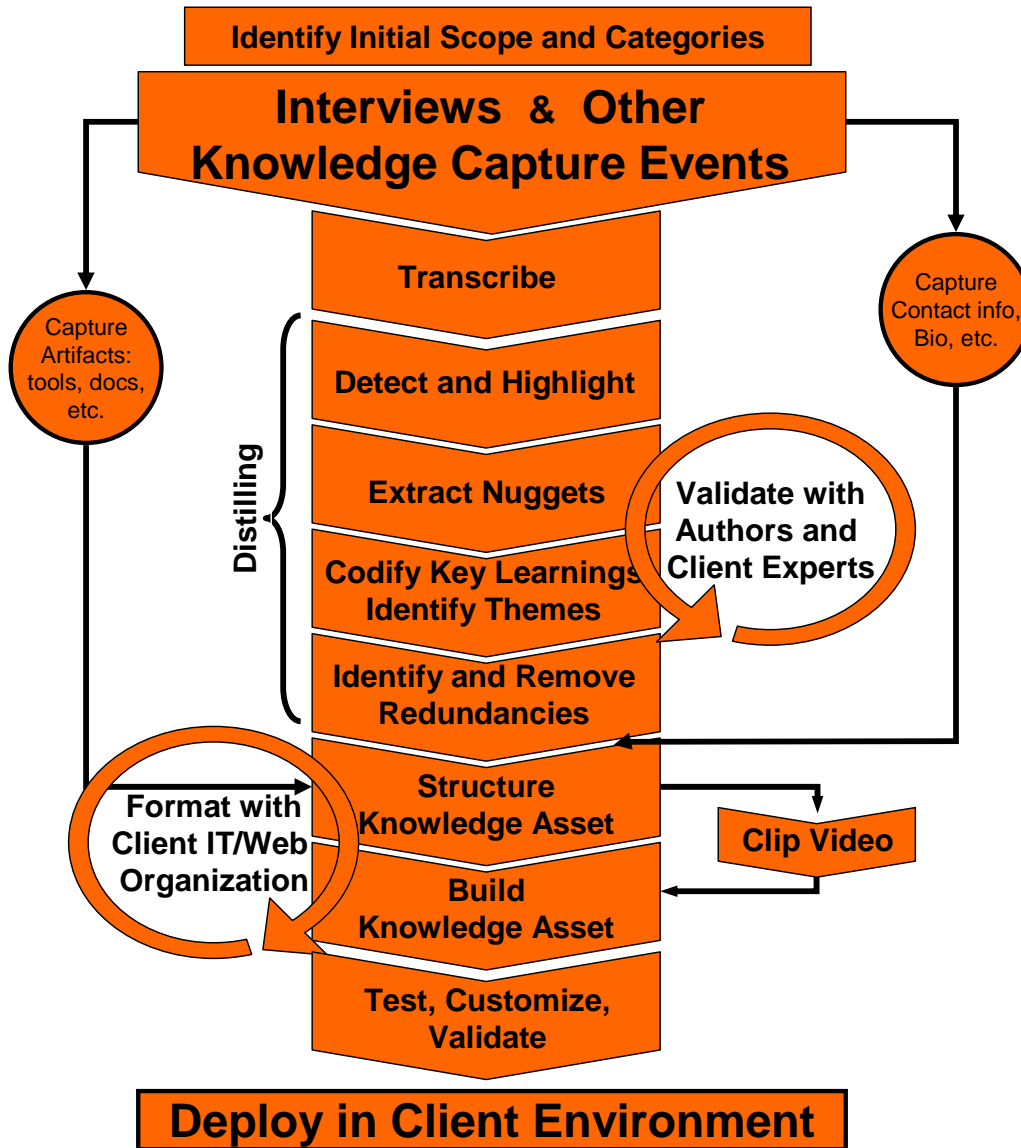
of all the people with any relationship with the content and/or a link to the relevant community of practice or other relevant networks.

8. Validate the Guidelines. Circulate the guidelines around the relevant community of practitioners and knowledge sources such as those interviewed. Ask them the following questions: ‘Do the guidelines accurately reflect your knowledge and experience?’ ‘What do you have to add?’

9. Publish the knowledge. Store and manage the knowledge in a space where it can be easily searched, found and accessed by its community or other potential users. Often this will be the company Intranet in the form of a digital knowledge asset as described here. New social media are available that make it easy to publish without having to master the programming or systems required to produce content on the Web. Wikis in particular are extremely suitable for documenting harvested knowledge because they enable contributions by others that have knowledge to share from other experiences.

10. Initiate a feedback and ownership process. Encourage feedback from users, so that they pick up and eliminate any invalid recommendations. Instil a sense of obligation that ‘if you use it, then you should add to it’.

Knowledge Capture Process



Capturing Just Enough

Often the level of effort to capture knowledge gets in the way of it happening. Imagine you have just completed a project and learned something new that you think your fellow practitioners might find useful. But you don't have the energy or motivation to document this in a manner that you think it would take for someone to really understand what you did and learned. In this case, a Knowledge Capture 'One-Pager' approach (Note: A free,

downloadable template for this is available on www.greenesconsulting.com) can be used to capture just enough about some important knowledge or experience that will prompt someone to reach out to the source and find out more.

Technical Considerations

The following questions are intended to help guide the technical implementation toward successful outcomes:

- Will the Knowledge Asset (knowledge repository) be a turn key, word hyperlinked document, or Excel baseline (knowledge breakdown structure) delivery
- Who will host the Knowledge Asset?
- Where will the Knowledge Asset be hosted?
- What is the technology upon which the Knowledge Asset will be constructed?
- What are the governance rules for hosting the Knowledge Asset?
- Who will have access and if access is to be controlled, what are the impacts to ensuring “sufficient capture and reuse of the knowledge contained within?”
- Will you as the developer have access to a site that enables you to monitor, add, tweak, change the asset as it evolved or will you have to do this through someone else?
- How will access be accomplished?
- Who is responsible for making the technical changes to the Knowledge Asset on the site?

Common Pitfalls

The following barriers and problems in the implementation of knowledge capture have been observed across many organizations:

- Trying to capture too much - Knowledge capture efforts should focus on what customers for that knowledge need, and not attempt to capture everything that is known about a particular topic. The basics of how to do something or foundational knowledge are probably already documented somewhere in a manual, guide, etc. Emphasis should be on what isn't widely known, new learning, and other knowledge that isn't typically documented in the usual manner.
- Underestimating the time and effort - It's a laborious process to harvest knowledge and present it in a manner that people can make sense of it for re-use and adoption. For example, it may take eight hours to distill a handful of powerful knowledge nuggets or insights from a one hour interview with an expert.
- Capturing knowledge that isn't used – unless you have identified what the potential customers for the captured knowledge are interested in, there's a good chance it's not what others will find useful.
- Assuming one size fits all - when it comes to methods for presenting captured knowledge it's important to understand people's preferences as receivers of knowledge. Some people find reading text a useful way to learn something. Others prefer to learn by listening and observing. In these cases, an audio version

of the knowledge shared by the source and a video of someone speaking or performing an activity are often very effective.

This guide is based on the work of Kent Greenes (www.greenesconsulting.com) and the KM Teams at British Petroleum and SAIC from 1995 to 2006.

Additional References

- Balancing Act: How to Capture Knowledge Without Killing It by John Seely Brown and Paul Duguid, Harvard Business Review, May – June 2000
- Learning to Fly: Practical Knowledge Management from Leading and Learning Organizations by Chris Collison and Geoff Parcel, 2000, Capstone, ISBN 1 84111250 9 1