



> SETTING IDEAS IN MOTION

A blurred, blue-tinted photograph of a group of people walking through a modern hallway or office space. The people are out of focus, creating a sense of movement and activity. The hallway has a high ceiling with recessed lighting and a polished floor that reflects the overhead lights.

Sharing information through Knowledge Exchange Frameworks

WHITEPAPER SERIES

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IF YOU HAVE KNOWLEDGE TO SHARE...

IT MUST BE FOCUSED TOWARDS THOSE WHO SEEK IT

Many organizations have a great deal of knowledge and experience that they would like to share with others. Handling large volumes of information, working and refining it into usable forms of communications, present their own challenges but all the effort is wasted if the results are mired in an information wasteland that's difficult to navigate, unfocused and of no apparent value for intended users. For example, it may seem easy enough to post helpful information on a website, but if users find the site unclear or difficult to navigate for what they need, they become frustrated, abandon their search and seek alternative sources – no matter how good the postings are. What's the solution?

A *knowledge exchange framework*¹ is a step-by-step process that acts as a clearing house to efficiently handle the confluence of incoming knowledge and package it effectively into clear, concise and consumable information – relevant for targeted audiences.

The purpose of this white paper is to present a blueprint for developing and applying a knowledge exchange framework. The paper's objectives are to help organizations meet the challenges they face in producing information products and structure a user-friendly way to share them.

A Knowledge Exchange Framework is a tool that helps organizations efficiently share information with its audiences.

¹ Ingenium Communications wishes to thank its knowledge exchange framework project clients for contributing their expertise and experience to the development of this White Paper. This White Paper is published as part of Ingenium Communications' White Paper Series. For more information and to access other papers published as part of the series, visit www.ingeniumcommunications.com

THE PRIMARY BENEFITS OF KNOWLEDGE EXCHANGE FRAMEWORKS: EFFICIENCY, CLARITY AND RELEVANCY

A knowledge exchange framework is all about efficient information management. It's a tool that can help smooth out the conduit of information passing from the organization to the end-user resulting in:

- Efficient handling of information in various forms
- Streamlined production processes
- Clear and relevant outputs

The framework takes an inventory of information in its raw or semi-processed state, accepting it in various forms, produces and packages the raw materials, finishing it with clearly tabled and focused information packages that become helpful to people using them.

The immediate and downstream benefits of efficient knowledge exchange will affect many areas of the organization including, improved returns on operational and marketing investments, reduced production and editing churn rates and enhanced customer satisfaction.

INFORMATION MANAGEMENT: THREE AREAS OF COMMUNICATIONS CONCERN

Creating a proprietary knowledge exchange framework starts with an assessment of its applicability to your organization's communications needs. Our benchmarking research reveals a wide landscape of knowledge exchange operations ranging from dysfunctional communications practices to models of management efficiency. Observations show that knowledge exchange frameworks have the greatest impact when the following common denominators exist:

- ❖ Organizational structures comprise complex and multivariate reporting structures
- ❖ Organizations deal with divergent groups of internal influencers and disparate external user groups
- ❖ Organizations want to share large volumes and variable information
- ❖ Organizations have complicated production processes involving short and long time frames

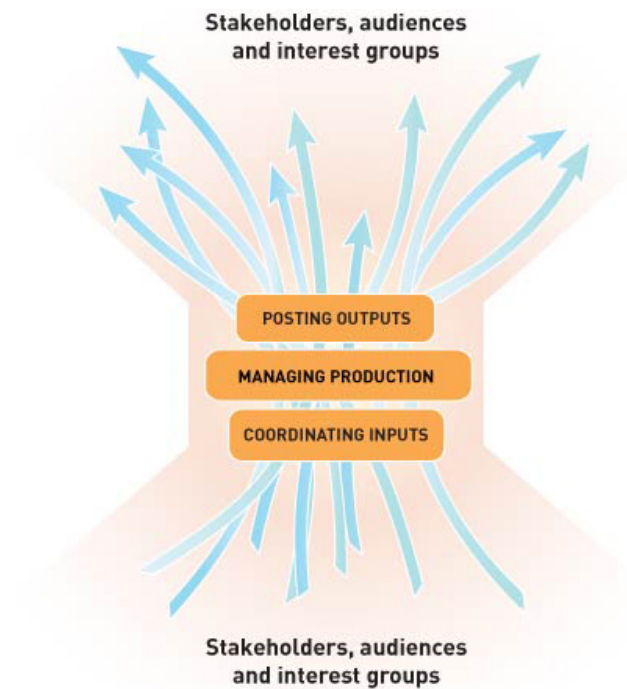
Of course the operating environments of big organizations and small ones differ, but communications challenges can be boiled down to three areas of concern:

1. Managing information inputs whether in raw knowledge or semi-structured formats
2. Processing the information inputs into finished states
3. Organizing and disseminating information outputs for intended audiences

These challenges present themselves to anyone that has knowledge to share, albeit with varying degrees of severity, significance and application.

Figure 1 highlights these communications challenges. The incoming confluence of prolific volumes of knowledge; the sheer magnitude of the production effort in the coordination of the publishing process, including long production cycles and complex approval protocols; the output of finished information products going to many different audiences.

Figure 1
The knowledge exchange environment



**TAKING STOCK:
SOLUTIONS TO COMMUNICATIONS CHALLENGES**

Table 1 summarizes a simple yet effective assessment matrix that highlights the most common challenges facing organizations in their quest to produce and communicate knowledge, and correlates these with possible opportunities afforded by a well-conceived knowledge exchange framework.

Table 1

Organizational challenges and Knowledge exchange framework solutions

Common communications challenge	Opportunity for a knowledge exchange framework solution
Qualitative and quantitative objectives need to articulate measures of success and clear definitions of successful outcomes.	The organization should set clear guidelines to achieve measurable targets and lead with basic key performance indicators to gauge progress.
Target audience definitions, behaviours and needs are not easily addressed or adequately streamed into the production, editorial and approval processes.	The organization should structure information users and audiences into consolidated groups that ensure information products are created and disseminated to meet target audience needs.
There are many raw knowledge contributors from various interest groups presenting enormous challenges around degrees of association, impact and relevance.	The organization should create a committee of principals or project managers to prioritize and organize various inputs, embrace the diversity and clarify the complexity of the information products it's charged with producing.
The production process including roles and responsibilities, timelines and approvals is not well understood or disciplined.	The organization should structure a streamlined workflow, with roles participants clearly understand and are part of <i>only</i> when their contributions are required.
The marketing and positioning of information products is constrained due to a lack of informational structure.	The organization can be more proactive in the marketing of its information products by creating hallmark knowledge exchange platforms – like an interactive website – and promoting its unique expertise through high-profile products.

BUILDING YOUR KNOWLEDGE EXCHANGE FRAMEWORK: A BLUEPRINT THAT WORKS

So how do we begin the process of developing a proprietary knowledge exchange framework? Harness this three-phased approach, laid out in an easy to follow guide.

Phase 1: Focus on audiences and their informational needs

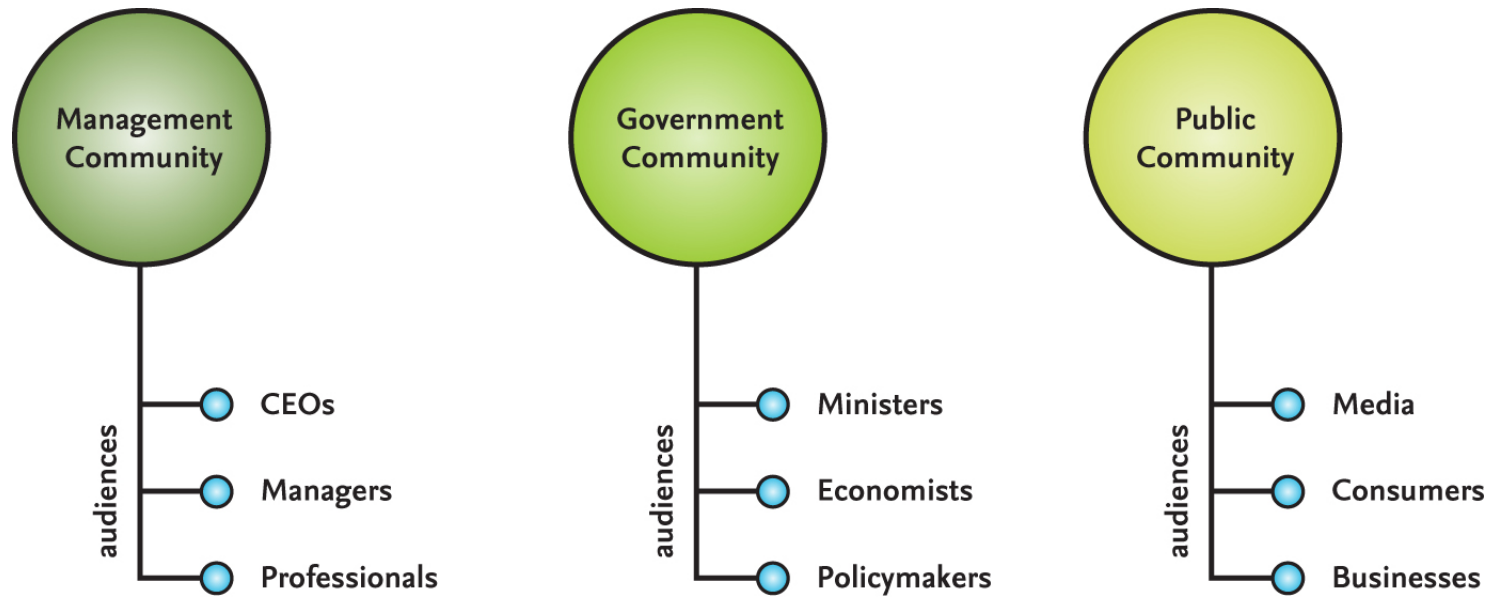
First, start with identifying your audiences and their knowledge-based requirements.

It's very important to consolidate stakeholders into groups based on their collective affiliations and benefits sought – through knowledge exchange – to help set guidelines on what information to post and how to post it. This segments internal and external audiences on behavioural traits taking their information requirements into account as a leading determinant for product relevance. It also clarifies the organization's sphere of influence by eliminating the ambiguity between external and internal audiences and identifying the most important audiences.

Figure 2 illustrates a segmentation model that groups audiences into three broad groups.

Figure 2

Grouping stakeholders into segments and some examples of their audiences



Phase 2: Refine the workflow

Next, refine the production and editing process by eliminating redundant roles and clarifying key communications responsibilities.

The following streamlining solutions were derived from a thorough analysis of various organizations. The recommendations are designed as sequential guidelines to be directional, instructive and minimally intrusive to ensure the highest possible adoption rate.

Smooth out the production process into a four-step approach, concentrating on minor refinements as follows:

1. ***Prioritization and confirmation:*** create a committee or quorum of influential editorial members responsible for objective setting, consensus building, topic prioritizing and resource allocating.
2. ***Creation and development:*** draft key competencies around *roles and responsibilities* and *quality standards* around researching, writing, editing and peer reviewing to minimize iterative corrections and approval stage delays.
3. ***Validation:*** set up a content approval stage where principals and subject matter experts signoff before the information is ready for production.
4. ***Production:*** outline key steps and milestones in the production process, creating a *production manual* if necessary coupled with a *production calendar* that includes an overarching list of anticipated and annual information product outputs, their lead time requirements, hard deadlines, key responsibility centres, resource allocations and budgets.

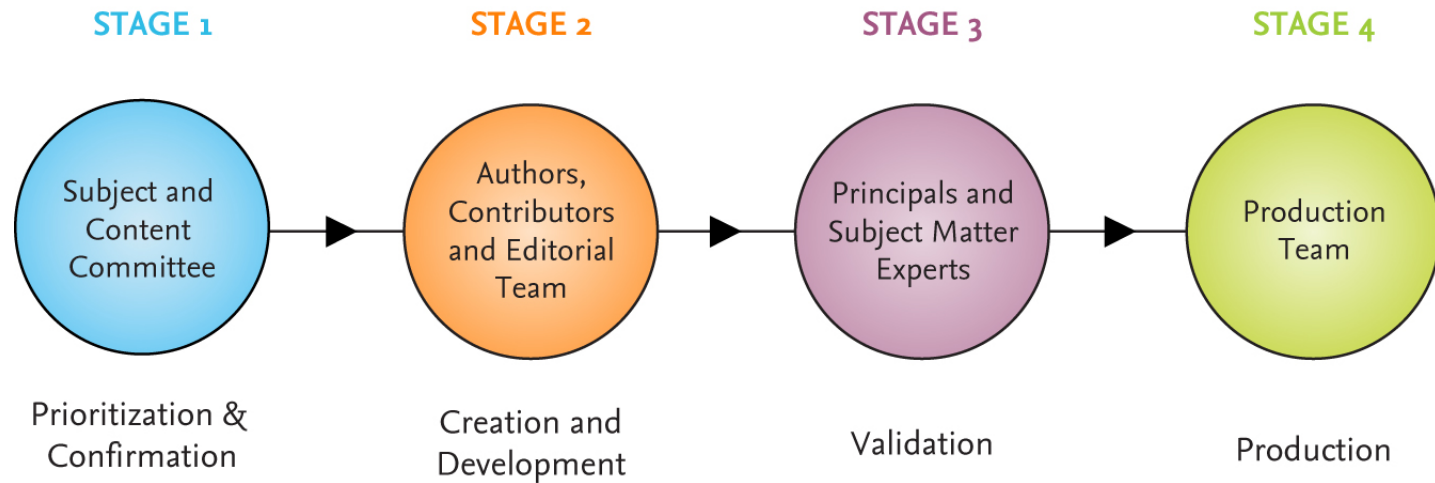
Improving Processes

- ❖ *Establish an editorial board of key players*
- ❖ *Define roles, responsibilities and quality standards*
- ❖ *Institute a concrete approval stage*
- ❖ *Develop a production manual and a production calendar to drive outputs*

Figure 3 illustrates the recommended workflow process – resulting in reduced handoffs, redundancies and repetitive roles.

Figure 3

The knowledge exchange framework workflow showing discrete roles



Phase 3: Facilitate implementation of the knowledge exchange framework

Finally you are ready for implementation. This entails establishing an environment that is conducive to accepting and implementing the knowledge exchange framework. Use the following mix of proven facilitation tools to establish an environment that will readily accept and implement your knowledge exchange framework:

1. *Table correlated products under a Product Map*

Construct a revitalized product map to set the foundation for a functional table of contents that meets the needs of segments and their audiences, highlights a functional warehouse for information products, directs users to efficiently search and retrieve reports from vast areas of knowledge and creates a relational database of ordered information.

2. *Work towards aggressively managing flagship products*

Mandated documents or high-demand information products that are produced regularly – like annual reports – should be dealt with as follows:

- Create a message architecture to standardize its content structure
- Prioritize its development within a *production calendar* amongst a listing of other key publishing initiatives
- Clarify milestones, resource allocations and deadlines through this calendar
- Develop an abbreviated version – such as a synopsis or abstract – for quick exchange of information

3. *Create a responsive website to navigate through a knowledge-rich landscape*

The website should be a focal point that opens the door to information products. The following recommendations point to functional suggestions to improve website navigation:

- Develop a simple home page structured according to a knowledge (information product) map that appeals to the broad segments you're interested in reaching
- Provide a quick reference section leading with abbreviated abstracts of the flagship information products
- Highlight an interpretive section with more detailed information for those users who want to dive deeper into heavier material
- Archive historical reports for viewing and self-serve printing, but post the most recent in PDF format and make some available in printed versions
- Provide online order-to-cash capabilities – through a credit card purchase capability if warranted – to order and purchase print-copy documents
- Consider testing social media interaction and invite, perhaps with controlled access, select audiences to answer, comment and contribute to blogs, but only after feedback mechanisms have been thoroughly tested
- Develop an online survey to gauge customer satisfaction and collect basic behavioral and identification data to stratify and report on meaningful measures of satisfaction
- Link to relevant domestic and international sites that relate to the subject matter

4. *Interpret historical performance to forecast results*

Trend reporting, forecasting and historical analysis might be some things that are important for the organization to communicate. The significance of compiling data year-over-year is to compare key performance indicators, interpolate movement within acceptable intervals and extrapolate the trends to arrive at accurate forecasts with reasonable probabilities of achievement.

Several communications options are available in trend reporting:

- Package the data in standardized formats using tables, charts and spreadsheets based on key performance indicators that remain consistent over time
- Invite professional users to have access to data that can be manipulated for analysis
- Develop an interpretive section in abstract form authored by experts
- Be pro-active and publish a regular report that has headline status that publishes trend analyses through standardized indexes

5. *Measure success*

Develop evaluation criteria to measure communications results based on pre-determined key performance indicators (KPIs) and milestone objectives. KPIs should have the following attributes that are critical in their ability to measure the outcomes of an applied knowledge exchange framework. The KPI must:

- Be representative and related to the process being evaluated
- Capture baseline data that shows meaningful and relevant metrics
- Measure trends – progress or regression – on a consistent basis over time

APPLYING THE FRAMEWORK: BEST-PRACTICE TIPS FOR SUCCESSFUL OUTCOMES

The following collection of best-practices is derived from the most significant findings that might contribute to a functional knowledge exchange framework in your organization:

- ❖ Concentrate on challenges that can be affected through the least intrusive process refinements
- ❖ Streamline the production process by consolidating functional stages, minimizing hand-offs and clarifying roles
- ❖ Clarify detailed information through multi-faceted formats including, abbreviated summaries, highlighted case studies and indexed chapters
- ❖ Provide up-to-date subject matter relevant to the designated target audiences while culling dated reports
- ❖ Minimize search iterations with a table of contents page to show clear relationships between publications
- ❖ Provide citations and abstracts for large publications
- ❖ Focus on flagship publications through branding
- ❖ Simplify, focus and group complicated and voluminous information inventory with a discernable and logical architecture
- ❖ Consider publishing large documents less frequently possibly replacing them with abbreviated versions to meet your organizations needs.
- ❖ Measure success through KPIs that capture user experiences on content, relevance and usability.

CONCLUSION...

STRONG INPUTS LEAD TO POWERFUL OUTPUTS

The functionality of a knowledge exchange framework can best be summed up using the jet engine metaphor for information management. A jet funnels in a large volume of air (in various forms and states), compresses it through a streamlined process of turbines, resulting in a focused thrust of useable power.

The knowledge exchange framework performs essentially the same steps starting with raw inputs of knowledge, handling those inputs through streamlined communication processes, resulting in focused and useable information.

This approach is a proven methodology to developing a framework that delivers results that map to the organizations goals and objectives. Use the following three-phased strategy as blueprint for developing your organization's knowledge exchange framework:

- ❖ Focus on audiences and their informational needs
- ❖ Refine the workflow
- ❖ Facilitate implementation of the knowledge exchange framework

Whether your organization is large or small a knowledge exchange framework is a proven process for disciplined communications and efficient information management.

*Contact us today for more information about **Knowledge Exchange Frameworks**, and to learn how we can help your organization streamline the sharing of its information products.*

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