EFFECTIVE WAYS TO CAPTURE KNOWLEDGE

How to extract information through different interview techniques

by Chris Bednar

Capturing knowledge is a difficult task in today's fast-moving virtual organizations. Here, Chris Bednar takes a look at knowledge management from a practitioner's perspective and offers some tips on how to elicit the most valuable information from busy or uncooperative staff.

Organizations are recognizing the need to place people at the center of their knowledge management initiatives. It's now accepted that two-way, face-to-face communication is the ideal way to accomplish a successful transfer of tacit knowledge. However, it's not always possible to get people to talk face-to-face. It takes time and effort to share knowledge and today's workers are constantly facing work/life dilemmas such as whether to spend an hour on the phone to a colleague who needs help or leave in time to make it home for dinner.

As more institutions increase in size and geographic scope, their experience is dispersed around the globe and personal links are weakened. Face-to-face communication may promote knowledge-sharing, but modern organizational structures are not conducive to "water cooler conversations" - flexible work hours and "hot-desking," compounded by high levels of employee turnover have resulted in short-term professional relationships and the inability to contact experienced people.

It's therefore crucial that we don't solely rely on two-way communication to capture a person's tacit knowledge; other methods must be employed if organizations are to capture and disseminate their accumulated wisdom. Interviewers and story writers can be brought in to quickly assist in capturing knowledge that might otherwise simply remain in employees' heads. In the end though, the job of one-way communication (written textual stories or video) is to lead to a conversation, which is what really leads to the transfer of knowledge.[1]

A good knowledge management system will narrow the set of people within an organization who would be the best to speak to about a given topic. Out of a firm of 6,000 employees, a knowledge seeker will only want to contact three at most who have the expertise he or she needs. As Paul Mitchell, UK head of Boston Consulting Group states, "I don't want 5,000 electronic entries on ice cream. I want to use the system to find out who knows about ice cream, then phone them for a chat."[2]

This article discusses interviewing, writing, and video communication as effective methods of capturing and disseminating knowledge. The objective is to provide some options to record a good story and to allow that story to be thoroughly understood by its future audience.

Capturing knowledge

Knowledge capture occurs in many ways. Employees are required by their firms to periodically summarize their experiences. Others voluntarily write articles or speak at conferences. Typically, this kind of knowledge transfer is inadequate because what the person writes about is rarely inclusive of everything they know about the topic and may even be slighted to appear favorable to the intended audience or to garner praise or a bonus.

Chris Bednar is records manager at Bain & Company, Inc. He specializes in record and information management, acting as a knowledge steward for Bain worldwide. This article was created as part of an independent study program for Simmons COllege and was published in its original form in The Knowledge Management Yearbook 1999. edited by James W. Cortada and John A. Woods, Butterworth-Heinemann, 1999.

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KEYPOINTS

Objective:

To capture organizational knowledge using a number of different methods.

Key points:

1. To elicit the most usable knowledge from an individual, it's better to interview people face-to-face than ask them to summarize their own experiences.

2. The sharing of knowledge can be accelerated using various communication media. Written communication may not be as effective a driver of knowledge transfer as interactive communication methods such as meetings and seminars.

3. Video is experiencing a renaissance as both a tool for knowledge capture and knowledge-sharing.

A good interview of this knowledgeable person, on the other hand, will remove the fluff and realize a more complete and honest presentation of information. Only by asking questions can the knowledge seeker drill down to the specifics of what the other knows and make this knowledge more applicable to their needs. Good questions will probe into the reasons behind decisions.

A growing number of corporations, such as BASF and IBM, understand this and have hired outside journalists to interview their people to understand how they made certain decisions which led to a successful or unsuccessful outcome. People properly trained in interviewing can often get more information from those who may not really wish to give it.

In a corporate environment, the interviewer must push to get at the most valuable information. Senior executives are loath to disclose anything that did not go according to plan. They will gladly tell you how successful the project was and how much value they created for the corporation, but when it comes to disclosing mistakes, they are not as forthcoming. This is where an investigative journalist can prove invaluable.

In my role as records manager at Bain and Company Inc., I have found that asking a series of focused questions greatly improves the overall understanding of a project. In a similar method to the US Army's After Action Review (AAR), I ask the following questions at the end of every project: What does this client do? What was the goal of the case? What was the hypothesis? How long did it take? Did we accomplish what we set out to do? If so, why? If not, why not? How did the client react? What was learned?

Often this provides a rich retelling of the project (see sidebar on page 4). Previous records of case work contained very rudimentary information, were dull and of questionable quality. This new alternative, story-like report offers a more interesting and complete perspective of the project.

Interviewing skills

Investigative interviewing requires a focus on body language and inflection as well as words. These are crucial to understanding the truth or the importance of what a person is saying. The journalist's six "open" questions who, what, when, where, why, and how encourage more than a simple "yes" or "no" answer and provide a useful way of characterizing the scope of information that may be acquired about a particular decision stimulus and organizational response.[3] Tips for conducting good interviews are:

- Write your questions in advance. This will prepare you for the interview.
- Establish a good rapport with the source. Be personable and put the source at ease.
- Note non-verbal cues.
- Before leaving, ask if there was anything you missed. Some points may have been forgotten during the "formal" interview.[4]

Written communication

Written stories play a large part in how information passes from person-to-person. Throughout history we have passed knowledge on through books, and paper documents are still the primary method of communication for many organizations. But written communication can rarely convey the entire story. Today's most respected storytellers are presenters who use dynamic inflections, hand movements and other emotive gestures to convey their message. Only by watching and listening can a person pick up these gestures. This is why the use of multimedia especially audio and video plays such a crucial role in the transfer of knowledge.

But written communication is still important and the key to good writing is to make the story understandable and memorable. Here are a few tips for better writing:

- Make the story descriptive and give it a conversational tone.

- Keep it simple. Clarify and explain via sidebars, charts, graphs or lists.
- Tell the reader what your research means. State what may be obvious conclusions.
- Suggest solutions where possible to the problems uncovered in your story.
- Put the information in context.[5]

Communicating knowledge via video

Only recently have we rediscovered the use of video and incorporated it into knowledge management. At IBM Global Services, after a global account sales deal is complete, the people involved are assembled and their collective story is captured on video. According to David Snowden of IBM, "Stories arc the way we communicate complex ideas." Videos provide ideas and allow future dealmakers to get a feel for how the process works.[6]

IBM is not alone in its use of video to record and communicate its stories. A well-known investment bank wanted to increase cross-selling using a IT solution. The systems manager asked the top bond salesman to add his information to the system, but the bond salesman refused to do so. Finally, the IS manager arranged for a videotaped interview. "Tell me about your client," was practically all that was asked. The bond salesman went on to describe his best client in great detail. His story was transferred to CDROM and sent to others dealing with the same client. Cross-selling went up dramatically.

Creating a win/win situation

Why should a manager co-operate with an interviewer? What's in it for them? Hopefully the firm has built a culture whereby a manager will not think twice about giving the time needed to contribute valuable knowledge for the good of the firm. If need be, incentives will help, but two more important items on a manager's mind may be trust and reciprocity.

How will managers determine that they can trust those who use the knowledge they have shared? Will they get credit for it? Will it be used in the proper context? Can they count on others to reciprocate with future exchanges of knowledge?

Certainly conducting an interview should take less time than asking the manager to summarize the important points of a project alone, but it's still time away from doing other things. If an effort is not made to give people more time to reflect on their knowledge to enable them to capture it, then they will simply retain that knowledge personally until one of three things happens: or they leave the firm taking their knowledge with them; they move on and forget most of the issues and decisions made on the individual project; they delay writing something that can be added to the KM system, and by the time they get around to it, it's no longer timely.

As suggested by Stan Davis and Christopher Meyer in *Blur*, the success of the firm is becoming more important than individual success as "independence blurs with interdepend-

ence."[7] Managers are being paid more as a percentage of their firm's profits rather than straight salaries. A connection between knowledge-sharing and remuneration may help to increase managers' desire to share more of their knowledge.

Trust is also an issue. Managers may feel uncomfortable sharing information with an external journalist, in which case it may be valuable to employ an in-house interviewer.

The librarian as investigative journalist

Organizations often already have the requisite interviewing skills available to them in-house in the form of the corporate librarian. Librarians are often qualified to perform the type of journalistic interviews mentioned earlier, as well as the important document management skills. It's therefore likely that the knowledge management roles of the future may become the natural career destination for today's corporate librarian. More and more companies are developing new positions for knowledge management professionals from CKOs to knowledge project managers and reporters, editors, and knowledge network facilitators.[8] At Ernst & Young, for example, there are facilitators of 22 different knowledge networks, managers of several new knowledge oriented organizations that create or distribute knowledge, a CKO, and several new communities to prioritize knowledge projects and set knowledge strategy

Skilled librarians already possess many of the skills required in a knowledge management professional. In a report compiled by Towers Perrin, the job description of an entry-level knowledge specialist required that the employee should: "develop and write abstracts, assign controlled vocabulary; maintain and update authority files for knowledge system; and provide general editorial services."[9]

Many corporate librarians are in the unique position of already being at the information hub of their firms. More important than simply becoming Web masters in many institutions, the library staff is directly involved in the day-to-day information research of the organization. When librarians discuss the issues of each new inquiry, the resulting conversations reflect perhaps the richest cross-office knowledge of what is going on within the firm.

The role played by the librarian must shift from a passive, service-oriented one to one of an assertive information consultant. They must be IT-literate and provide the following functions: environmental scanning; information collection and development; forecasting knowledge requirements; evaluation and measurement of quality and cost-effectiveness; and distribution of knowledge across the organization.

Rolling out worldwide

Implementation of procedures like these needs to be standardized across all offices in an international firm. Ideally a person or team in each office would hold the responsibility for ensuring that knowledge is contributed in an equal manner especially involving the quality of materials put into a

global system. However, it will not work unless there is a leader to champion, control and maintain the standards, and create rewards and/or penalties. Allowing local staff to take part in their piece of the global knowledge management program will promote buy-in and good will among the various offices.

The answer – hire the best people and encourage them to talk

The key to successful knowledge capture and dissemination is to find the person who best knows a particular subject within your organization, interview them on video, have prepared questions to run your interview, and promote natural answers by asking open questions.

Take that knowledge and create a contextual, compelling story using text and video, and store all of it, especially all contact information, in a database with a good retrieval engine and search capabilities.

A strategy for growth in the Chemicals industry

A major manufacturer of a chemical used in rubber, ink, toner, and plastic –a product which is hard and expensive to ship, yet cheap to make –approached Bain & Company Inc. to implement a strategy for growth.

The chemicals industry is well known as a stagnant, commodity-like business with a regional bias and the consulting team was charged with the goal of raising profits. To do this they focused on three possible directions:

- Increasing market share or increasing prices of core business;
- Expanding geographically;
- Growing through other adjacencies within the value chain.

Working on the hypothesis that there were limited opportunities to grow in its core business, the manufacturer planned to diversify into businesses which it currently supplies: selling by-products; exploiting current technologies for other products; and entering into a distribution business.

Early in the project, the consulting team led a two-day strategy planning session with 35 key client thought leaders and managers. Through journalistic interviews, the team captured 259 individual ideas which were tailored, combined, and edited, resulting in about 150 actual growth ideas.

An in-house client team was organized around the various clusters of growth opportunities: core business assessment (USA and Europe); geographic expansion; and adjacencies. Each idea was further researched using their own resources on industry capacity, interviews of the salesforce, management, and direct customers, competitor profiling, and information on various country regulations involving trade, shipping and tarifs.

The consultants recommended a set of options and with this guidance, the client felt capable of going forward with implementation.

Reflections on the case

The program captured the collective knowledge of the in-house team and taught them ways to develop a stagnant business. At the end of it they had a clear focus on their Strategic planning (there had been too many ideas on a list - the program showed the value of careful selection). The initiative forced them to rethink their business.

Overall, the interviews provided the manufacturers with a Strategy for growth that came from its own knowledge base. The consultants effectively refined the organizational knowledge that was already there.

Chris Bednar

Bain & Company

E-mail: chris.bednar@bain.com

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