Achieving Closure Through Knowledge Management Strategy

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Abstract: Case studies of knowledge management practices are often conducted in organizations where the aim is to manage knowledge for future operational improvements. What about knowledge management for organizations with limited life-spans that are preparing for closure? Such organizations are not common but can benefit from knowledge management strategy. This case study concerns the knowledge management strategy of an organization that is preparing for its final phase of operations. We facilitated two group workshops with senior managers to scope a strategy, following which the organization initiated a set of projects to implement the resulting actions. This paper reviews their implemented actions against those designed in the workshop to shed light on knowledge management in this uncommon situation.

Keywords: strategy; knowledge management; limited life-span; implementation; evaluating group workshops.

1. Introduction

The focus of a knowledge manager's role is often to improve performance through enhancing business processes, believing that even if immediate measurable paybacks are few, performance improvements will reap benefits over the long-term. Research in knowledge management has concentrated, with few (if any) exceptions, on organizations with a future; assuming that changes today will over time feed through to performance improvements.

There is almost no empirical research which informs our response to a client/collaborator who asks "Our organization is closing – what should we do about knowledge management?" Such a client has a great need for knowledge management. However, the literature is very limited indeed, perhaps because the opportunity to research an organization with a limited life-span is extremely rare. There has been a stream of research on joint ventures, some of which do indeed have a limited life-span, but we are not aware of any work specifically looking at the knowledge management implications for such organisations.

This paper reports initial results from an ongoing research study with an organization that has a limited lifespan, which for reasons of confidentiality will be called ConsumProt. ConsumProt is a consumer protection organization. We facilitated two group workshops, several months apart, including senior managers of both operational and support departments. In the first workshop the managers explored knowledge management and developed a preliminary action plan for improving knowledge management practices. The second workshop focused more in-depth on four of the issues to be tackled – issues which the managers agreed were the most crucial and realistic priority areas given the constraints imposed by time pressures, budget and the need for rapid results before closure. The output from these workshops was a programme of actions that had the agreement and commitment of managers from both departments.

The paper first briefly explores the knowledge management issues associated with an organization having a limited life-span. The organization and the workshops are then described in more detail. Next the nature of the actions agreed in the workshops is outlined, leading to a more detailed discussion on what the organization is actually doing to improve knowledge management practices in preparation for the final phase of their operations before closure. The paper concludes by identifying potentially transferable lessons, noting that even in continuing organizations, helping people to develop their skills and secure future employment has a wide applicability.

2. Knowledge management with a difference

In the extensive literature on knowledge management, the future life of the organization is rarely explicitly considered. Well-known texts (Nonaka and Takeuchi, 1995; Davenport and Prusak, 1998) typically imply an unlimited future for the organization. If one looks hard, it is however acknowledged that an ever-expanding future is not the only possibility, and that there can be some negatives relevant to the context of knowledge management. These include the need to archive knowledge in case key staff leave (Mullin, 1996; Probst *et al.*, 1999); and losing knowledge through downsizing (Bair, 1997; Probst *et al.*, 1999). These are examples of the more general term "knowledge erosion", used by Hendriks and Vriens (1999) and coined originally by Lucardie

and Arts (1990). This refers to the loss of knowledge resulting from people leaving an organisation or changing jobs within it. Whether organizations can have a "memory" that goes beyond that of the people in it, or a knowledge archive or repository, remains a moot point (Walsh and Ungson, 1991).

A particular problem for an organization facing closure is that knowledge workers are said to require better than average working conditions (Drucker, 1992; Probst *et al.*, 1999). An organization with limited life-span runs an especial risk that its most valuable staff will leave first.

All the aspects above would apply to any organization facing closure. Additional factors relevant to the particular organization described here were the need to preserve knowledge (in some form) for the replacement organization and to continue to carry out the same amount of work with fewer staff. These are, however, different forms of very common knowledge management problems of knowledge retention and more effective knowledge use to promote greater efficiency.

3. Introduction to the organization and the workshops

ConsumProt is a non-statutory regulatory organisation charged with consumer protection and raising standards in its industry. When it was set up in 1997, the possibility that an official government body would in time replace it was acknowledged, and it has only recently been confirmed that this will happen towards the end of 2004. ConsumProt's goal for knowledge management was to identify and evaluate a knowledge management strategy that would initiate or improve processes and tasks in order to continue effective operations for a defined period and close the operation of the organization more effectively. For obvious reasons ConsumProt would only consider actions which could be implemented quickly within existing resource constraints, with immediate/rapid payback.

ConsumProt is split into two operational departments – A and B, with a range of other supporting departments (including department C as mentioned later). Tensions in the organization were high, both across and within A and B. Taking their toll on the employees were the combining pressures of a declining workforce who were not being replaced, the prospect of unemployment, uncertainty over when unemployment might happen, a healthy

workload, and a culture of 'us and them' between A and B.

Our involvement with this organization began as part of a project to find out what managers in UK organizations thought about the present and future state of knowledge management in their organization. More details of that project may be found in Edwards *et al* (2002) and Edwards *et al* (2003b).

The methodology used was based on facilitated, computer-supported group workshops, the specific approach being called Journey Making (Eden and Ackermann, 1998). Space does not permit a detailed explanation here. More information on the approach, in the context of this particular knowledge management project, may be found elsewhere (Edwards *et al.*, 2003b; Edwards *et al.*, 2002; Edwards *et al.*, 2003a), and a more general discussion can be found in Shaw (2003) and Eden and Ackermann (1998).

We now look at each of the two workshops in detail.

3.1 The first workshop

The first workshop was a scoping exercise. The aims of the workshop were (1) to understand what knowledge ConsumProt needs to harness to improve its business; (2) to develop effective processes to harness knowledge; and (3) to consider how these processes should be evaluated.

During this workshop the group explored the enormity of their task in terms of: the knowledge which informs their business and which had to be managed; where effort needed to be placed to improve existing processes and initiate new processes; how they could evaluate progress on knowledge management; and over what time scale results might be seen.

The group identified a range of actions that might improve their knowledge management activities. These covered 17 different areas of the business, including: operational efficiency; external and internal communications (written and verbal); external acquisition of knowledge; archiving knowledge; external views of ConsumProt's effectiveness; codifying knowledge; key performance indicators.

These 17 areas were then further structured into 6 core concerns for the future: accepting and managing change, archive knowledge, communication, process efficiency, review

priorities, and staff issues. *{Note that throughout the paper we use exactly the phrases used in the workshops, even where it leads to inconsistency in the parts of speech, as here.}* Instead of attempting to address all 6 core concerns within existing resources and time constraints, the group decided to concentrate on one topic for the rest of the workshop, and follow a similar methodology for the other core concerns when they returned to their workplace.

The topic they concentrated on was staff retention. As well as being central to the "staff issues" core concern, this also impacted on several of the others. Given that some employees' contracts would finish before the organization closed, it was critical to try to retain the remaining staff to allow a planned run-down. Three elements central to staff retention were identified, and discussed in as much detail as time permitted:

- Monitoring staff attitudes – to attend to satisfaction and motivation.
- Expanding remits and refocusing expertise – contingency planning through mentoring and work shadowing.
- Training and professional development – to make staff more appealing to the market when searching for future employment.

3.2   The second workshop

Three months later a second workshop took place. The aims of this workshop were "to explore how we can improve the sharing of information within the organization; and to develop an action plan of 3-4 achievable 'next steps' that can be completed within 6 months".

Early in the workshop it was decided to concentrate on four topics for improvement. These were staff development (including training and professional development from the previous workshop); team building (including staff attitudes); communication of roles and functions (including expanding remits and refocusing expertise); formal continuous process improvement. As may be seen, three of these originated from the focus on staff retention in the first workshop, while the fourth explicitly centred on one of the other core concerns, improving process efficiency.

Taking one of these areas as an example – staff development – the group designed three programmes of actions that, they felt, would make significant progress in this area. The programmes of actions are displayed in the map in Appendix 1 and were:

- Encourage the development of transferable skills within the organization – so that skills of people who leave are not lost (contingency planning). Actions included: prioritise the skills that need to be transferred; rotate jobs within the same department, job swaps, buddying; document key procedures; build a skills database.
- Making better and consistent use of existing software – to enable freer information exchange. Actions included: assess email workloads across the organization; managing software better enabling all tasks to be located in same software; identify training needs.
- Develop a training strategy – to retain staff and prepare them to move on. Actions included: develop training plans; provide career counselling; get staff to take advantages of opportunities; offer rewards and recognition.

For each programme of actions the group assigned 2 or 3 managers who would take responsibility for further design and implementation of the actions, and for reporting progress to the group (the names shown in the map are disguised).

Programmes of actions (and maps) at a similar level of granularity were developed for each of the other three areas for improvement. Rather than commenting more fully on each of these areas, we prefer to use the limited space here to review what the organization has actually done. This will form the core of the next section.

4.   What the organization is doing on knowledge management

The second workshop was a catalyst for setting up the 'Aston Group' project, which is the name of both the initiative and the team leading the change programme.

Six months after the workshop the project was described by the organization's internal staff newsletter as "an internal initiative with the aim of improving the way information and knowledge is shared and used within ConsumProt … the [senior] management team fully support these initiatives."

The newsletter described seven components of the initiative, so-called 'projects'. We will review these projects and the approach taken to address them – to identify what the

organization is actually doing on knowledge management in its limited lifespan. This will lead to a comparison between what they are doing and what they had agreed to do in the workshop – to explore the use of the workshops in determining this direction.

The 7 project areas of activity, each led by at least two 'project managers', are:

Project 1: Contingency Planning – ensuring knowledge and skills of people leaving the organisation are not lost

This project involves encouraging management to find ways of preventing skill shortages if and when employees leave the organization.

Initially a very analytical approach was designed: planning to identify the key functions to be maintained during the remaining life of the company and to produce a matrix of skills necessary to carry out those tasks. Then as a separate exercise, a schedule of existing staff and their skills was to be generated and mapped against the tasks matrix, thereby identifying areas lacking contingency (Coombs and Hull, 1998).

Following consultation with department heads, a more pragmatic approach was adopted to dovetail with the strategies set by individual departments to manage workload in the remaining period. Since then:

- Department A has launched a succession planning initiative. Employees are being trained to assume roles other than their core job function and the artificial boundaries between some functions have been removed.

- Department B has identified a number of labour-intensive tasks which can be re-designed to lower effort and time. This includes redesigning the client audit process, and lowering the emphasis on visits to clients' premises. The staff currently on these tasks will be redeployed within the organization to create skills contingencies. Additional experienced staff have been recruited on short-term contracts.

- In department C (a support department) any gaps will be plugged with temporary staff as there is already a significant amount of shared knowledge within the department.

Most of the attention on this project has been placed on the key operational areas of the organization. Future attention is required on three key support parts of the organization – one being the Senior Management team. As with all 7 of these projects, this work is ongoing.

Project 2: Retention strategy – focusing on staff retention and preparing people for the future

This project is being developed at a corporate level and fits with the strategic focus for closure of operations. Support has been offered throughout the organization to help staff to develop their plans for the future, for example through the provision of support for individuals' own training and development goals, and staff have been offered career profiling and counselling. Soon help in developing CVs will be offered. Many team members are making use of the opportunities for gaining personal development and qualifications.

Project 3: Build an open and supportive environment to encourage teamwork

This project aims to encourage staff to work as a team organization-wide, and relates to breaking the "us and them" atmosphere that would play a destructive role as the organization becomes smaller and there is more dependency across departments. A key part of this project is showing that everyone is human and approachable. The newsletter is being used a tool for this – through a Personal Profile section – to highlight individuals and to give the rest of the organization the opportunity to learn a little more about their colleagues and identify shared interests. Those featured here have been operational, rather than executive, staff.

Project 4: Implement continuous improvement – focusing on using staff knowledge to improve our processes

This project aims to ensure that the organization is operating in the most efficient and effective way. As part of this project, volunteers from all departments have been sought to join a 'Focus Group' to discuss ways to improve and streamline processes and implement these improvements. So far nine volunteers have responded, showing a willingness throughout the organization at the operational level (ConsumProt has fewer than 100 staff in total).

Project 5: Enhance everyone's knowledge of each other's roles and impact on the organisation

Project 6: Create a sense that we all belong to the same organisation

Building an open and supportive environment (project 3) complements these two inter-related projects. Part of this work is being implemented through the newsletter's Personal Profiles section by including a summary of an individual's job activities. In addition, the

minutes of departmental management meetings are being circulated outside the department – to share knowledge of issues and activities around the organization.

The newsletter has been supplemented by cross-department awareness training and presentations to increase each other's understanding of roles and processes, and generally to increase departmental visibility. In addition, the annual organization-wide away day enables everyone to get to know one another in a positive and relaxed environment. More informal social events are planned, with many impromptu events being centred locally.

Project 7: Make better use of existing software

This project targets improving users' awareness of available software and improving skills in a range of applications. This aims to deliver organizational benefits in improved productivity and personal benefits in additional transferable skills.

The first step involved assessing existing staff's IT skill levels by means of an IT literacy survey. The goal was the identification of potential IT trainers for particular applications and those who wanted/needed further training

in them. Analyses of the results are currently taking place. Future work will involve the design and scheduling of appropriate courses.

4.1 Summary

The projects are highly interlinked. Progress on one project often leads to progress on one (or more) other(s). There is also considerable overlap of the projects with the organization's seven 'Core Values' (Make a Difference, Innovation, Teamwork, Support, Integrity, Learning, Enjoyment) which govern its internal management and policy making process. Thus it is expected that this work will further enhance the application of the core values within the organization.

5. Comparing agreed and implemented programmes of actions

In this section we return to the 4 topics for improvement explored in the second workshop. We examine how the projects being implemented address each of these four topics. Table 1 summarises the comparison of agreed and implemented actions.

Table 1: How projects contribute to the four topics for improvement

Project number:	1	2	3	4	5	6	7
Staff development	x	x			x		x
Team building	x	x	x	x	x	x	x
Communication of roles and functions	x			x	x	x	
Formal continuous process improvement	x			x	x		x

5.1 Staff development

Development of skills and professional qualifications is a core theme of the actions being implemented. Four projects have elements of staff development:

▪ *Project 1* – Staff development is taking place through skills sharing and succession planning to build contingency into the organization's skills availability.

▪ *Project 2* – The main focus of this project is to raise the marketability of the staff through identifying training and development goals. While this is aimed at retention of staff who are being trained, it also helps to prepare them for future employment.

▪ *Project 5* – Some staff development will be a consequence of the awareness-training which is part of this project as staff will be exposed to issues they were

previously unaware of – though its primary focus is team building and communication.

▪ *Project 7* – Identifying and fulfilling staff software training needs and raising skills is a component of this project.

With regards to staff development, each of the actions in these project were discussed in the workshop as part of developing staff – comparison with map in Appendix 1 supports this. However, and while we recognise the restrictions of limited resources, there were 3 issues discussed in the workshop which are not part of the actions as reported in the newsletter:

▪ Rewards and recognition – there is no explicit mention of any formal recognition scheme for staff development.

▪ Create a cross-functional buddy scheme – there are a number of initiatives which encourage cross-departmental

information sharing and support, but not this one specifically.

- Document key procedures – documentation, and archiving (as mentioned later), has been neglected in the implementation strategy despite its importance in the workshop.

5.2   Team building

Team building is an important factor as the organization diminishes in size putting more emphasis on the existing, smaller workforce being able to work together. All projects aim to build team working:

- *Project 1* – Through having succession planning in advance of people leaving, the organization is able to build teams through closer working with colleagues while they are still employed.

- *Project 2* – Through having a more consistent workforce the team will become stronger which may positively influence the retention of key social and operational staff.

- *Project 3* – The aim is for an open and supportive environment through getting to know each other. The newsletter and social events are both vehicles for this.

- *Project 4* – Cross-functional team building is occurring as staff are working in the continuous improvement focus groups with colleagues whom they might not normally encounter.

- *Project 5* – Cross-awareness training and presentations exposes staff to individuals they might never have had reason or opportunity to talk with before – even in the few minutes of informal chats before and after such sessions.

- *Project 6* – The annual organization-wide away day and the informal social activities are a central part of team building.

- *Project 7* – Depending on how the training sessions are organised, it is possible that having cross-sections of the organization together in the same room learning about software again provides exposure to other individuals in the organization. The lunch and tea breaks are useful opportunities.

All but one of the actions for team building have been implemented. The exception is:

- Increase formal and informal team building sessions between departments on a scheduled basis – it is the 'scheduled basis' of this action which has not been reported. There was the away day, and reportedly informal social events, but it seems that repeated formal events to

supplement the away day have not been core to the teambuilding strategy.

5.3   Communication of roles and functions

ConsumProt aim to communicate, and expand, the remits of staff as well as refocus expertise to more critical areas of their business. Four projects move the organization towards this:

- *Project 1* – Through building a skills matrix and task matrix the organization is able to identify individuals with re-deployable skills. This is a first step to expanding remits and refocusing expertise.

- *Project 4* – Through the continuous improvement groups staff are able to explore their working with colleagues whom they might not normally have an opportunity to interact with. The second workshop itself was cited as an example of this benefit.

- *Projects 5 and 6* – Entirely focussed on sharing knowledge about individual roles and departmental functions. These are supported through: newsletter articles promoting individual roles; cross-departmental awareness training sharing information on departmental functions; sharing the minutes of departmental management meetings across the organization; the away day bringing the entire organization together for discussion.

Many of the agreed actions for improving communication have been implemented. There are two actions which have not been reported on:

- Monthly summaries of Executive activity – this has not happened, although minutes of meetings are being circulated more widely.

- Information flow to people working off-site – however, the number of formal client visits is being reduced so perhaps there is less of a need for mass information flow. However, there are still off-site people to be communicated with and they need more formal information than newsletters and the like.

5.4   Formal continuous process improvement

Improving and rationalising the processes and services is made more urgent due to the diminishing workforce. Four projects address this:

- *Project 1* – Some labour-intensive tasks have been re-designed to lower time/effort and enable those resources to be re-deployed.
- *Project 4* – Cross-departmental focus groups are tasked with reviewing and streamlining processes.
- *Project 5* – The additional awareness gained by staff of other peoples' roles and departments' functions will enable additional process efficiencies to be identified – provided some mechanism exists for this feedback to reach the appropriate responsible individuals.
- *Project 7* – The process improvements from effective and consistent use of software will be realised through migration to common software and consistent training in how it should be used in ConsumProt.

It might be that while the organization is re-designing processes, these are not unconditionally process improvements from the customer's viewpoint. The reduction in formal client visits to save resources might not mean an improvement in the service offered.

There are four actions on which progress has not been reported:

- Automation of repetitive tasks. Automation takes time, especially without large-scale investment, and in addition there needs to be some prerequisite level of IT skills and a consistency in how software is used, so progress here would not be expected to be rapid. It is likely that in the near future the continuous improvement focus groups will have been able to automate where appropriate.
- The staff suggestion scheme – certainly the focus groups and more team meetings will capture more suggestions from staff, but there are no reported opportunities for 'uninvolved' or off-site staff to feedback into the decision making process. Again, there is no mention of a reward for any suggestions which come through other processes.
- Asking customers about improvements – the knowledge management strategy has been largely an internal initiative and there is no mention of looking externally for guidance on process improvements.
- Measuring improvements – as yet there have been no measurements of improvement proposed. ConsumProt do however have another workshop scheduled with us and we anticipate

evaluation of improvements may be a central theme.

6. Conclusion

The management of ConsumProt are confident that knowledge management while faced with closing operations is necessary and within their control. Their knowledge management strategy is an active one, designed to positively influence the work environment. The implementation of actions is progressing well, even while a diminishing workforce is creating additional strains and the life-span is ever shorter. The strategy has 5 main foci (in no particular order):

1. Improve the skill base of existing staff (with new skills and qualifications) to benefit the organization, retain those staff in the meantime, and make the staff more marketable following closure. This emphasis on individual development is rarely seen in the knowledge management literature, with a few exceptions such as Skyrme (1999).
2. Retain the skills currently available through building contingencies in the workforce and having overlap in roles and capabilities.
3. Communicate with the staff and encourage their feedback through the newsletter, away-days, questionnaires, distributing meeting minutes, and awareness training.
4. Build a supportive, welcoming environment in which to work so that people will not be motivated to leave before closure. This is achieved through a diverse range of actions, such as: publicising staff who are known throughout the organization to show their 'human' side; encouraging staff who never normally talk to one another to do so in the work environment and socially; getting people involved in the improvements through focus groups; enriching jobs with diversity.
5. Rationalise processes to enable the resources saved to be redeployed to create contingencies in other areas of the organization.

Looking at these as examples of good knowledge management practice, numbers 1-4 would potentially be valuable to any organization, whether with a limited life-span or not. There is, however, a difference in emphasis in numbers 1 and 4, looking to the future of the staff after closure. The major difference is perhaps in number 5. Process redesign can be recommended to any organization, but at least in the case of ConsumProt, the limited life-span means that the main aim is rationalisation, not necessarily

improvement. In the terms coined by Hansen et al (1999), ConsumProt is very much following the personalisation strategy.

By our estimate 31 of the 41 actions agreed during the workshop have been implemented, with 10 outstanding. However, many of these 10 are overlapped by other actions which have been implemented and so the additional benefit foregone is likely to be small. This is significant progress in a relatively short time (just over one year from the first workshop at the time of writing).

Management at ConsumProt may need to safeguard against too much change for certain individuals. While some people might flourish in a changing environment, others might be overwhelmed and uncomfortable with seeing so much change happen, never mind being asked to change themselves. This seems to be an issue which has been overlooked in the existing strategy, but is perhaps more appropriately addressed at a line management level.

6.1   Acknowledgements

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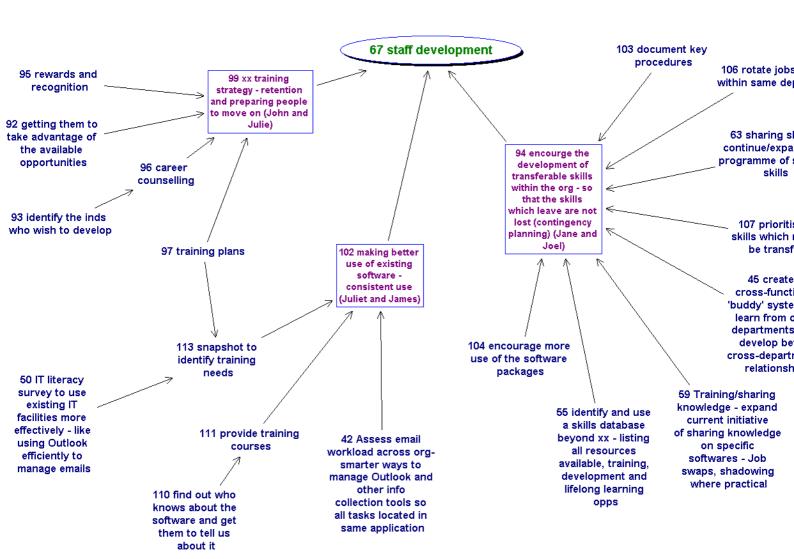
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67 staff development

95 rewards and recognition

92 getting them to take advantage of the available opportunities

99 xx training strategy - retention and preparing people to move on (John and Julie)

96 career counselling

93 identify the inds who wish to develop

97 training plans

113 snapshot to identify training needs

50 IT literacy survey to use existing IT facilities more effectively - like using Outlook efficiently to manage emails

111 provide training courses

110 find out who knows about the software and get them to tell us about it

102 making better use of existing software - consistent use (Juliet and James)

42 Assess email workload across org- smarter ways to manage Outlook and other info collection tools so all tasks located in same application

103 document key procedures

106 rotate jobs within same de[

94 encourge the development of transferable skills within the org - so that the skills which leave are not lost (contingency planning) (Jane and Joel)

63 sharing sl continue/expa programme of skills

107 prioritis skills which be transf

45 create cross-functi 'buddy' syste learn from departments develop be cross-departr relationsh

104 encourage more use of the software packages

55 identify and use a skills database beyond xx - listing all resources available, training, development and lifelong learning opps

59 Training/sharing knowledge - expand current initiative of sharing knowledge on specific softwares - Job swaps, shadowing where practical

Appendix 1 – An anonymised map from ConsumProt illustrating their agreed actions on staff development