

# Creating a Knowledge Sharing Culture

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Over the past ten years, we've had the opportunity to visit and work with fifty or sixty companies implementing knowledge management, self-service, and social support. In the process, I've come to feel like a bit of a connoisseur of corporate culture—I expect other consultants know exactly what I mean. Shortly after arriving in an office, I get a sense of whether the culture will be helping us through the hard work of leading change...or whether it will fight us every step of the way.

Because culture matters.

## What Does a Bad Knowledge Sharing Culture Look Like?

Later on in this ebook, I'm going to say what I think an effective culture feels like, and how to go about creating one. But I'm going to start with the "fun" one: how to tell you have a challenging culture. In tribute to Spinal Tap, all our lists go to eleven.

1. **Disbelief in what leaders say.** You can see this most after an all-hands meeting breaks up, as groups get together to try to figure out what management really meant—trying to decode the secret message by parsing what was and wasn't said. In some organizations, taking executives' words at face value just isn't even considered. This distrust is never more damaging than when change is coming. For example, if employees are looking for the hidden motivation behind doing KCS ("are they about to lay off all the expensive engineers?"), they won't embrace it.
2. **Happy talk that's not based in reality.** These untrusted leaders are often the same ones who deliver overly optimistic reports about how things are going, an optimism that reinforces the view from the trenches that the leader is either lying or deluded...and neither is good news. Of course, it's the leader's job to help everyone see the good, and the possibilities in even the most challenging circumstances. But that's not the same as denial.
3. **Obsession with the urgent and tactical, leading to an inability to focus on the important and strategic.** Since we like to schedule design workshops and training, we see this most when everyone is simply too busy doing things using the current process (which isn't working), that they don't have a few days to devote to figuring out a process that does work. Also, if things are continually rescheduled because of the crisis du jour, watch out: crises should be short-term anomalies, not a way of life.
4. **Front-line managers changing what they say based on who is around them.** If managers act like part of the team most of the time, but turn into weasel-boss when their managers are around, they'll lose their team's respect. Oh, and it's worse still, if they take credit for the team's work. Don't

worry, bossman, if you credit your team, it reflects well on you, too. (HT to Jill Geiseler for this point.)

5. **Fear about new metrics.** Measures should be to “guide, not grade,” in Phil Verghis’s memorable words. But if people are used to being hit over the head with measures—if measures are customarily used for rewards and punishment—then don’t expect them to embrace them. As a matter of fact, the first thing workers will do is figure out how to game the measures, making them worse than useless.
6. **Job insecurity.** If people are worried about whether they’ll be employed, they’re not going to be eager to embrace change—especially if they distrust the motivations behind it. You might say this is unfair: companies going through a rough patch may have to lay people off, and why should they have a harder time improving processes than successful companies, when they’re the ones who need to improve the most? And you’d be right. But it’s still true.
7. **The expectation that rewards go to the well-connected.** I think this is one of the things people mean when they say their workplace is “political:” when promotions, raises, recognition, and fun work don’t go to the people who deserve it, but to others that, for whatever reason, are in management’s good graces. In fairness, management probably disagrees, but that just reinforces the workers’ notion that management “doesn’t get it.”
8. **The ability to opt-out, especially for the most talented.** It’s great to have a culture that encourages and respects superstars. But, in some organizations, we’ve seen this taken to extremes, where the highest performers are somehow a law to themselves. They don’t need to follow processes. They don’t have to do the parts of the job they don’t like—often including documenting knowledge. Sorry, artiste, we love your work, but even you can’t simply opt-out of our change initiatives!
9. **Distrust among groups.** If Professional Services blames Development, Sales blames Marketing, Support blames Operations, and everybody blames the CFO, then no one will be pitching in to create a shared resource like a knowledge base. I remember a support executive telling me once, “why should we build a knowledge base just so the web team can take credit for it?” Ouch. Speaking of distrust, if you can’t leave your laptop unattended inside your secured workplace for fear of it being stolen, consider looking for work elsewhere.
10. **Unvoiced Disagreement.** “Fear of conflict” is one of Patrick Lencioni’s Five Dysfunctions of a Team, and it’s endemic at some of the least healthy companies we’ve worked with. It seems counterintuitive—don’t we want a work environment where everybody is nice? But the reality is that there are disagreements and conflicts to sort through. Sometimes they’re based on

misperceptions, and sometimes they're absolutely real. Either way, nothing will get resolved unless people are willing to discuss them (ideally, in a positive and de-personalized way.) I once found out that a participant in one of my workshops got in trouble with her boss because she was airing objections to KCS. I told her that she was my hero in that workshop—since everyone was thinking these objections, and no one was saying them, without her leadership, we couldn't have had the conversations we needed to have. It's a shame her boss didn't get it.

11. **A lousy work environment, food service, and coffee.** Look, we're not all going to work in the Googleplex with free gourmet lunches and company-branded ice cream treats. But we spend a lot of time at work, and our mental state there matters, and our heads are influenced by our environment. (There's a reason they spent so much time building cathedrals in the Middle Ages.) If I go to an office building that's dingy, dreary, sterile, and cut off from natural sunlight, I know something. If the coffee service comes out of 1950s-style glass carafes and hotplates with generic pre-ground beans in foil packets, I know something. If people resign themselves to the depressing burger-and-fries or meatloaf options at the cafeteria, I know something. And if the company hasn't spent the money for decent computers, double monitors, comfortable ergonomic chairs, and IT that works, I really know something. I know the company doesn't really care about the employees, no matter what they say, and it's going to be wickedly hard to get the team excited about taking on a new challenge.

Well, enough of the negative! Let's move on to the good.

## What Does a Good Knowledge Sharing Culture Look Like?

A list of undesirable cultural traits is pretty easy for all of us to make, unfortunately; even if we're blessed not to work in one, we've all seen Dilbert or Office Space.

The more interesting questions are, "what makes for a good culture, especially as it pertains to embracing knowledge management practices?" And then, "so, how do we do that?" This section is focused on the first question; stay tuned for thoughts on the second.

We know we're more likely to have a fun and successful engagement when we walk into the office and see this:

1. **Easy laughter.** Have you ever paid attention to people laughing at work? It doesn't mean someone just finished telling a joke—there's something more subtle going on. I'm not quite sure I can put my finger on it, but when it sounds natural and unforced, it seems like a helpful relationship lubricant that can smooth out the inevitable rough spots of workplace interactions: impossible deadlines, difficult customers, or an untimely application of

Murphy's Law. Somehow, genuinely laughing colleagues remind me that we're all human, and we're all in it together.

2. **Difficult discussions.** Real workplaces require difficult decisions about which smart and well-intentioned people will disagree. Real leaders give feedback that people don't always like to hear. If I see evidence of these hard conversations happening, or better still, if we have the opportunity to participate in them, I feel really good. The best work happens when people bring their whole selves, don't stay quiet out of fear, and most importantly, give a damn.
3. **Reviews aren't surprising.** Annual or semi-annual reviews are a fact of life in most organizations. I think they're fine...as long as they're just the formalization of a continuous and ongoing stream of feedback the rest of the year. The acid test is this: is the employee surprised by anything she learns during an annual review? If so, the manager isn't providing enough feedback.
4. **A sense of purpose.** Now, I don't think you have to set out to cure cancer, although it's great if you do. And many grandiose mission statements mean nothing in relation to what employees do on a day-by-day basis. But I think each individual needs to have a reason, beyond a paycheck, for coming in to work, and that reason is all the more powerful if it's shared by a group. Category leadership, delivering on the brand promise, and or just making customers' lives a little easier and nicer are all fine purposes. Bonus: a shared purpose is a litmus test you can bring to difficult decisions. If an action doesn't address the purpose, maybe it's not a good one to take.
5. **Optimism in the company's success.** Everyone loves to be on a winning team. Groups that believe they're doing well in the market will embrace new challenges and work to raise their game. Oddly enough, the team's faith in the company's success might be ill-founded, but in my experience it doesn't seem to matter much.
6. **Engagement.** When people are meeting, is everyone participating? Do they seem to really be there? Or is their smartphone or laptop the center of their attention? You can tell when employees are really there—there's an unmistakable vitality and energy. "Be here now" isn't just yogic advice—it's also the right way to work.
7. **Genuine caring for customers.** The very best organizations feel almost proprietary about their customers—solicitous of their well-being, empathetic when they have issues, and proud of them. This is something that just can't be faked: saying you care about your customers is meaningless. You have to feel it, which leads to acting it. (By the way, the truth is that not all customers are worthy of this level of care. Select them carefully and fire them if needed.)

8. **Investing in employee success.** It's a mark of a good culture that employees get what they need to be successful, from technology to office space to travel and training. There's a real Golden Rule aspect to this: executives should give employees the resources they'd want if they were doing the same job, with no more second-guessing than they would want. Giving an employee the autonomy to get the things they need without a lot of hassle is a sign of trust, and the first step in being trusted is showing trust.
9. **Team members holding each other accountable.** Looking back on a successful knowledge management rollout, Robert Rose remarked to me, "David, you're making it too complex with all this process. Just build a strong community, and they'll make sure that everyone is making quality knowledge contributions." He's right. But it's easier said than done.
10. **Learning is more important than being right.** The sweetest words in the English language may be, "You know, I think you're right and I'm not. Thanks—I learned something!" Yet in some organizations, admitting mistakes or gaps in our knowledge feels very dangerous. When people are happy to learn from each other, how can knowledge sharing not happen?
11. **Good coffee.** I know, I know, but I still think it's really important. (Quick story: we had a CFO once who didn't care for the strong Peets coffee we ordered, so he would put less than a full measure into the grinder. It turns out, he actually WAS a bean counter.)

## How to Create a Knowledge Sharing Culture

Having looked at signs of a bad and a good culture for knowledge-sharing, respectively, it's time to get to work. How can we make sure we're setting our knowledge program up for success?

I didn't always think this stuff was important, by the way. I started my work in knowledge management on the technology side, building innovative KM environments for intelligence analysts, librarians, support engineers, and self-service customers. When people started talking about "culture" and "alignment," I would roll my eyes and get back to work on the search algorithm.

But in the last decade or so, I've decided that culture is the most important thing—almost the only important thing. Of people, process, and technology, the people are the ones who make the decision, consciously or not, to use the process or technology, every day. And culture is simply the sum of environmental forces that make one decision, or the other, more likely. Get the culture right, and the default behavior for most people will be to do the right thing. Get it wrong, default behavior will be wrong, and you end up in an "enforcement" or "compliance" battle, which is never a winning strategy with knowledge workers.

With that, here are some tactics that encourage a good knowledge-sharing culture:

- 1. Convince leadership that knowledge sharing is a core part of the mission.** Francoise Tourniaire likes to say, “Culture is a downstream phenomenon.” The first and most essential step in creating a knowledge sharing culture is making sure that leadership believes it’s important. Unfortunately, especially in support organizations, I’m afraid many leaders don’t understand their organization’s job, which is customer success. They think their mission is to close cases. Now, closing cases is an important part of delivering customer success, but it’s only one part of it—CSI members report that only 2% – 3% of customer issues are resolved through a service request for B2B companies, and far fewer in B2C environments. The rest are handled through self-service, customer communities, and other social channels. So, yes, even if we were only closing cases, knowledge is really helpful for doing a great job of the 2%. But knowledge is the ONLY hope for the other 98%, not to mention fixing the customer experience so the problems don’t surface again. The execs really need to focus on the whole iceberg, not just the part they can see and are used to managing.
- 2. Make it part of the job.** In today’s world, it’s not enough for staff to have their technical chops and their soft skills—they also need to be able to communicate in writing. (Note that this is not the same as needing to be a technical writer.) The ability to collaborate and share knowledge should be written into every knowledge worker’s job description, and their success doing this should be part of every review and feedback session. We need to hire for knowledge sharing, and train, coach, and develop it on the job.
- 3. Make it a byproduct of collaboration.** Your team members are collaborating now—it’s what humans do. They may be collaborating with specialists on the team, or they may be collaborating with a customer to figure out the root cause of a problem. The question is, after there done collaborating and problem solving, is there a permanent record that can be shared? Is there an artifact? In other words, is collaboration also knowledge creation? Michael Idinopulos makes a wonderful distinction between “in-the-flow” collaboration tools and “above-the-flow” collaboration tools. Above-the-flow tools are ones where you have to step out of your daily work to document your knowledge (like most traditional knowledge bases, or like Wikipedia.) In-the-flow tools, or as KCS would say “capture in the workflow” tools, are those that are integrated into the tasks that you’re already doing. When people say “it’s hard to get people to contribute to the knowledgebase,” it’s an almost sure bet that above-the-flow work is involved.
- 4. Take the net out from under the high wire.** This is counter-intuitive, but true: the less review there is before publishing information, the higher the quality of the submissions. You might think that having checkers and editors and reviewers and SMEs poring over each article would make people extra careful not to make a mistake. And it’s true, if you reject a few articles (I wince as I type that word “reject”), people will learn to stop contributing. But

- for most professionals, especially the kind you want on your team, the “reviewers” they care most about are the actual content users: their peers and their customers. If they feel insulated from their mistakes or sloppy work by people who will clean up after them, it’s only human nature to relax and let the checkers take care of it. On the other hand, if they know that their name is going on something that’s going to be published as is, then their pride and self-respect will ensure they take more care with it.
5. **Everyone needs to understand “why.”** Not long ago, I watched a support analyst do a great job of helping a customer with a complex, but familiar, issue. I say “familiar” because he was able to give detailed directions to the customer without consulting a reference of any kind. At the end of the call, he sighed, pulled up the knowledge base, searched for the article that described that problem, and linked it to the case. I asked, “Why did you do that?” He said, “Because I have to.” I asked, “Why do they make you do it?” He shrugged, shook his head, and answered the next call. As we discuss in our workshops, there are at least seven benefits for him to have made that link...parenthetically, many of which he missed out on by doing it after the call. But he had no idea. How can we expect to do the right thing by default if they don’t know why they’re doing it? We need to remember to practice [unreasonable overcommunication](#).
  6. **Get ‘em early.** Have you ever noticed that it’s easier to get the new people to follow your processes than to get the veterans to change how they do things? We’ve often seen the most successful KCS practitioners, and the best KCS coaches, are people who join the company after KCS launches. So, make sure that the hows and the whys of knowledge sharing are taught early in the onboarding process, ideally in the first week. If there’s training on how to use tools (like CRM or the knowledgebase), make sure that the training goes beyond the mechanics, and really explains the process and its benefits. Your people are smart; they can use the tools. But they need to understand what they’re trying to accomplish with the tools.
  7. **Continually reduce technology irritants.** John Ragsdale, Vice President of Technology Research for TSIA, recently reported that, of all the vendor categories he surveyed, knowledge management vendors scored lowest. (2012 TSIA Member Technology Spending Report: Support Services: Adoption, Satisfaction and Planned Spending Across 24 Areas of Technology and Services, John Ragsdale, May 7 2012) I’ve had [my own words to KM vendors](#), too. At every company I’ve ever visited, literally, service and support staff complained about the technology. Now, imperfect technology is no excuse for not implementing good business process, but as a KM program team you really get a lot of credit and goodwill for improving technology. It’s not always practical to replace the tools, and there’s no perfect tool out there. But by looking at the [clever things users are doing](#), simplifying tasks with configuration and customization, writing some helper apps, and integrating

tools better, you can make a big difference in users' lives, and in their attitude towards sharing knowledge.

8. **Build on enthusiastic peers.** As a manager, if you have an employee who is excited about knowledge management, and one who is reluctant, whom do you spend time with? Many of us inveterate problem solvers immediately want to spend time with the reluctant person, to turn them around. But, just as strength-based leadership reminds us to focus on our strengths, not our weaknesses, so would I encourage you to make time for your most enthusiastic team members. Build on their enthusiasm by recognizing them, and making them peer coaches. Over time, the organization will respond to the positive attention to your early adopters far more than your laggards would benefit from your attention. "When the student is ready, the teacher will appear." Over time, the laggards will either get on board because it's what the organization is doing, or they (or you) will decide this isn't the right organization for them. Either way, don't invest your time and energy where it's not going to generate a return.
9. **Measure to improve.** Companies love to measure things, and nowhere is that more true than in service and support organizations. But it's not the measuring that matters; it's what we do with the measures. Too often, operations reviews are a mind-numbing parade of too-small-to-read graphs, with little or no analysis of the story they tell. Or, worse still, they're an opportunity to shame middle managers over dips in performance or satisfaction (regardless of whether those dips are within normal variation or not.) Organizational culture is best served when:
  - You focus on the important measures (which assumes you have a clear enough strategy that you know what's important to measure)
  - You only present measures that you'll do something about
  - You never present a measure without saying what you think it means, taking time as a group to discuss competing hypotheses as needed
  - Measures are used to learn and improve, not to reward and punish
10. **Communicate the wins.** Did you just get a note from a grateful customer whose thorny issue was resolved surprisingly quickly with the help of a knowledge base article? Did article feedback come in from an important customer thanking you for saving their hash at 3AM on Sunday during an upgrade? Are case volumes going down while the installed base is going up? Let people know! Celebrate! Thank article contributors by name, and encourage more and better.
11. **Remember, it's never done.** It seems like, once a knowledge sharing culture is established, it should keep itself going. After all, success breeds success. Unfortunately, as with most human endeavors, "things fall apart." Continued leadership and even unreasonable overcommunication is required. And if worse comes to worst and you find you need to restart your



knowledge sharing initiatives, then restart them—and know you're in very good company.

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