

# Knowledge Management in Practice



Anthony J. Rhem



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"This evidence-based book provides the framework and guidelines that professionals need for working with the contemporary explosion of data that is creating opportunities and challenges to all phases of our society and commerce."

—Larry R. Medsker, Research Professor in Physics and Data Science,  
The George Washington University

**Knowledge Management in Practice** is a resource on how knowledge management (KM) is implemented. It provides specific KM methods, tips, techniques, and best practices to gain competitive advantage and the most from investing in KM. It examines how KM is leveraged by first responders, the military, healthcare providers, insurance and financial services companies, legal firms, human resources departments, merger and acquisition (M&A) firms, and research institutions. Essential KM concepts are explored not only from a foundational perspective but also from a practical application. These concepts include capturing and codifying tacit and explicit knowledge, KM methods, information architecture, search, KM and social media, KM and Big Data, and the adoption of KM.

Readers can visit the book's companion website, KM Mentor ([www.KMMentor.com](http://www.KMMentor.com)), where they can access:

- Presentations by industry leaders on a variety of topics
- KM templates and instruction on executing KM strategy, performing knowledge transfer, and KM assessments and audits
- KM program and project implementation guidance
- Insights and reviews on KM tools
- Guidance on implementing and executing KM
- Specialized KM publications
- A private secure collaboration community for members to discuss ideas and get expert answers and advice



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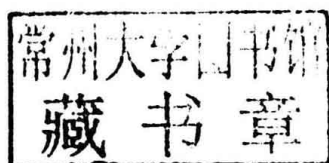
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# Knowledge Management in Practice



I dedicate this book to my mother, my angel, and to whom  
I owe all that I am and all that I will ever be; Marine McCloud  
Rhem is my angel in heaven constantly looking over me.

Also, I dedicate this book to my wife Tanya and to my son  
Jaren and daughter Jasmine, who remain my inspiration to  
continuously strive to be the best I can be every single day!  
And ... for all of those who have a dream and the will to pursue it!





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# Foreword

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People and civilizations desire and cherish wisdom—inspired wisdom or the kind from experience that leads to deep expertise. In knowledge professions, the pathway to wisdom is data → information → knowledge. As the penultimate step, knowledge involves notions of the nature of an expert versus a novice, heuristics based on experience, and depth versus narrow intelligence. The pathway starts with the imperative for clean, relevant, error-free data in a form suitable for analytics and scientific analysis. Information should be relevant to the needs of the users, in an appropriate format for interpreting and archiving, and should be presented for convenient visualization.

People in small communities and large organizations collaborate and share their experiences, so capturing and reusing their knowledge are important for increasing group effectiveness and efficiency as well as for fostering innovation. For organizations, a key challenge is to identify needs for collaboration and to share collective knowledge. This means understanding who holds knowledge and what knowledge they have. Tools, techniques, and processes are thus needed to capture, store, and reuse the many types and instances of knowledge in an organization.

KM includes practices and procedures, as well as the people and systems, that support societies' information and knowledge needs. This includes ways to encourage organizations and individuals to add value and share knowledge. Managers and knowledge professionals then implement KM methods and techniques, differentiating them for specific industries and subject areas. In practice, KM must address the varying requirements in specific industries such as healthcare, human resources, military, and finance. The different environments and cultures require consistent procedures that identify and analyze relevant content, organize knowledge, create effective access, and promote a knowledge-sharing culture through education and training.

Organizations need detailed information on applying KM practices to solve real-world problems. They need to establish organizational policies that lead to successful KM adoption and to understand reasons why KM projects fail. Organizations need to apply known lessons and tips to ensure successful implementation of KM practices and to elevate the value of adopting KM policies.

Dr. Anthony Rhem's *Knowledge Management in Practice* is unique in the degree to which his extensive experience informs his insights and writing. At a time of such great attention to Big Data and data analytics, this book reminds us that knowledge is after all the ultimate goal of careful work with data and the creation of accurate information. Identifying, capturing, and managing knowledge as a critically important asset are formidable tasks in our large corporate and governmental organizations. This evidence-based book provides the framework and guidelines that professionals need for working with the contemporary explosion of data that is creating opportunities and challenges to all phases of our society and commerce. To our benefit, this book captures the considerable wisdom Dr. Rhem has acquired over his career as a KM professional.

**Larry R. Medsker**

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# Preface

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Knowledge is recognized as a valuable asset in organizations across many industries. How knowledge is shared, leveraged, obtained, and managed will be the difference in how successful and sustainable an organization will become. This book is a culmination of my years of experience in the knowledge management (KM) discipline. Since 1998, I have been involved in various KM activities such as researching, developing processes for capturing and codifying knowledge, developing KM systems, developing and operationalizing KM strategies across several industries, writing articles and books, developing and teaching KM curriculum, and speaking at numerous KM conferences.

## Why I Wrote This Book

The use of KM principles, practices, and procedures has expanded enormously since 2010. This expansion has also brought about the proliferation of KM systems in its many forms such as contact center knowledge repositories, expertise locators, content management, document management, knowledge repositories/libraries, social media applications, and decision support systems. The inclusion of KM from a strategic point of view to streamline revenue, increase revenue, improve performance, attract/retain customers, and manage human capital has enabled organizations to maintain and/or improve their competitive edge. To compete in a local, national, and/or global market, organizations, including educational, government, and military, are looking for that differentiator, and KM has proved to be just that. I wrote this book to capture and make available my experience in implementing and practicing KM across many organizations to scholars and practitioners of KM. This book is a resource that presents how KM is being implemented along with specific KM methods, tips, techniques, and best practices to get the most out of a KM investment.

## What This Book Is About

This book covers how knowledge management is leveraged in several industries. The various uses of KM practices, policies, procedures, and methods, including tips and techniques, to create a competitive advantage are examined. Industries

such as first responders, military, healthcare, insurance, financial services, legal, human resources, merger and acquisition (M&A) firms, and research institutions are covered in this book.

Essential KM concepts are also explored not only from a foundational perspective but also from a practical application. These KM concepts include capturing and codifying tacit and explicit knowledge, KM methods, information architecture, search, KM and social media, KM and Big Data, adoption of KM, and why KM initiatives fail.

The following are the subjects that are covered, and what you can expect from the various chapters:

- **Chapter 2: The Case for Implementing Knowledge Management**  
This chapter details the factors you must consider before implementing KM in your organization and details the various practices and policies of KM. Moreover, the needs for your organization to launch a KM initiative/project and/or establish a KM program are addressed.
- **Chapter 3: Being Social: Knowledge Management and Social Media**  
This chapter examines how social media tools and techniques are becoming facilitators of knowledge for the organization. Specific guidance and insights are given to develop your organization's social media strategy and to determine the social media tools, techniques, and platforms that can be used to take advantage of what social media can bring to KM.
- **Chapter 4: Dude, "Where's My Car?": Utilizing Search in Knowledge Management**  
This chapter details the importance of search in KM, in particular a KM system. Several aspects of implementing search are examined, including the importance of having user-centric information architecture.
- **Chapter 5: The Age of Discovery: Knowledge Management in Research Institutions**  
Research institutions play a key role in product innovation. KM is a catalyst for stimulating and sustaining a high level of innovation. This chapter examines how KM is used, focusing on various KM methods that can and in some cases are being incorporated at research institutions.
- **Chapter 6: "Where Have All My Experts Gone?": Knowledge Management in Human Resources and Talent Management**  
When it comes to talent management, KM can play a critical role in ensuring that the knowledge assets are captured and made available to the enterprise. KM in talent management when applied holistically involves capturing and sharing employee knowledge from onboarding to exit interview.
- **Chapter 7: "Sound the Alarm!": Knowledge Management in Emergency and Disaster Preparedness**  
Emergency and disaster preparedness is enhanced through the incorporation of KM. Putting the right knowledge in the right context at the right time

in the hands of first responders could be the difference in saving lives and preventing casualties. It is important to begin with a comprehensive KM strategy to establishing a plan to deliver the knowledge in a timely manner.

■ Chapter 8: Happily Ever After: Knowledge Management in Mergers and Acquisitions

When organizations merge or are acquired, there is a level of uncertainty both from a macro (organization) level and from a micro (employee) level. Applying KM to M&A will enable the organization to know what knowledge is important to retain, who those knowledge holders are, what are the knowledge gaps, and how to quantify the knowledge of the organization. From an employee standpoint, having the organization share knowledge about the pending transaction as well as incentivize employees to share what they know and to assist employees in transitioning (within the new organization or to a new organization) will go a long way to ensure a smooth M&A transaction.

■ Chapter 9: “Is There a Doctor in the House?”: Knowledge Management in Healthcare

The healthcare industry has become individual centric. As the healthcare community moves to electronic record keeping and capturing patient information at the point of initial interaction, having accurate knowledge about that patient as well as having the patient knowledgeable about his or her own health is essential to the success of caring for that patient. KM is an essential ingredient for healthcare success, especially in the areas of drug interaction analysis, sharing of patient diagnosis between hospitals and doctors, and furthering the development of healthcare informatics.

■ Chapter 10: “Show Me the Money!”: Knowledge Management in Financial Services

KM in the financial services sector centers on being able to attract, serve, and retain customers. Delivering the tools to customers that provide knowledge to make sound financial decisions is at the heart of what KM will provide. To bring innovative financial services and products to the marketplace and to have an understanding of their potential benefits to customers, imparting training to customer service representatives on specific knowledge will also be a critical component of KM.

■ Chapter 11: “Are You in Good Hands?”: Knowledge Management in Insurance

In this chapter, you will learn how KM is used in the insurance industry to communicate knowledge to customers, agents, and customer contact centers while providing mechanisms for employees to share, capture, and catalog knowledge. KM in the insurance industry will provide the knowledge to (among other things) complete applications, bind insurance, and service a claim.

- Chapter 12: “Sign Right Here!”: Knowledge Management in the Legal Profession

In this chapter, use of KM to enhance the management of a law firm and to execute client engagements will be presented. KM in law firms is primarily executed through the building and fostering communities of practice around practice specialties. This enables legal representatives to respond to a situation with the right expertise, equipped with the right knowledge to resolve a legal matter.

- Chapter 13: “A Mind Is a Terrible Thing to Waste!”: Knowledge Management Education

This chapter examines the state of KM education. This examination includes KM certification programs, KM curriculum at institutions of higher learning, as well as KM education policies, procedures, and future direction of KM education. In addition, specific criteria to be considered while selecting a KM education option are presented.

- Chapter 14: “Big Knowledge!”: Knowledge Management and Big Data

In this chapter, use of KM to gain knowledge from your Big Data resources will be examined. The use of KM on Big Data to provide a rich structure to enable decisions to be made on a multitude and a variety of data is the essence of this examination. Along with specific analysis of the various types of data and KM methods for examining this data, a detailed understanding of KM’s impact on Big Data can be realized.

- Chapter 15: “What Have You Done for the War Fighter Today?”: Knowledge Management in the Military

KM in military has a rich history. Use of KM in the military, with special attention to events such as Base Realignment and Closure (BRAC), will be examined. In addition, a look at the various branches of the military (army, air force, and navy) and their KM strategies, KM systems, and KM methods are presented.

- Chapter 16: Drinking the Knowledge Management Kool-Aid: Knowledge Management Adoption

Adoption of KM programs, policies, methods, and systems is a challenge for all organizations. This chapter is all about adoption! If your organization does not adopt its KM principles, practices, processes, procedures, or systems, it may be recognized as a failure. Specific guidance on improving KM adoption and positioning your KM initiatives for success is also presented.

- Chapter 17: Failure Is Not an Option: Why Do Knowledge Management Programs and Projects Fail?

With lofty promises come unrealized results. KM gained widespread popularity in the 1990s; however, many KM initiatives failed and this popularity has tapered quite a bit. Since the mid-2000s, KM started to experience a renaissance; some disparate KM achievements were witnessed (call centers, research, human resources, and military), and KM

is now considered as a discipline to gain a competitive advantage over competitors. Although KM is being used with some level of success in this new knowledge economy, many KM initiatives still fail. This chapter details the factors that contribute to the failure of KM initiatives as well as measures to adhere to in order to achieve successful KM.

An in-depth synopsis of each chapter and an overall introduction to the book are included in Chapter 1. The concluding chapter (Chapter 18) provides a summary of the book and an insight into what's next for KM.

## Who Should Read This Book

This book will provide KM educators, practitioners, and those who are new to KM an insight into how KM is being implemented by providing tips and techniques that will enable the reader to be more productive in their application of KM and those who are being educated in KM an understanding of how KM is used in a variety of industries to solve pertinent issues. In summary, *Knowledge Management in Practice* will be a definitive KM reference for anyone entering into the field and/or currently practicing KM.

## What You Will Learn

This book is intended to provide comprehensive guidance on how KM is implemented in several industries. The following points identify what the reader will learn:

- Key learnings identified based on the specific industry
- Tips and techniques for the KM practitioner and novice to be productive
- Major concepts and solutions to problems addressed by KM
- A KM reference for practitioners to aid in solving actual problems
- Practical approach to presenting KM concepts and their application
- Identifying the benefits of implementing a KM solution
- Specific guidance on delivering and executing KM strategies
- Guidance on selecting the “right” educational option for KM education
- Foundational and practical application of KM methods
- Real-world application of KM

## How to Leverage This Book

There are several ways to leverage this book. An immediate way is to read the book cover to cover and understand how KM is being used in several industries, as well as understand the various concepts that are being presented. However, a more



pragmatic approach would be to focus on a specific industry presented in the book and refer to the related chapters that delve deep into the KM methods, procedures, and best practices that were indicated in the industry-specific chapter. Either way, you are sure to gain the insights you need to make KM successful and to increase your KM acumen.

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