A Guide to Global Best Practice and Standards in KM

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Executive summary

In November 2018, the International Standards Organization (ISO) published its new standard on knowledge management – ISO 30401. This is the first standard on knowledge management (KM) ever to be introduced and is global and industry agnostic. The standard came about due to an increasing recognition of the need for, and importance of, Knowledge Management, as well as a certain amount of ambiguity in the understanding of what KM is.

The standard begins by defining eight key principles of knowledge management, which taken together form the basis of best practice in the discipline, before going into prescriptive text about how organizations should carry out KM in practice.

The standard acts as a good guide for an organization of any size, in any sector, located anywhere in the world, to be able to benchmark its KM practices. It also acts as a useful toolkit for organizations that are just beginning their KM journey and need advice on how. This collection of case studies features organizations from many different sectors across the globe that are demonstrating best practice KM. Each case study deals with a different theme expanded upon in the standard, showing how KM is evolving, allowing readers to understand what is required by the new global standard in more practical terms.

The published standard is prescriptive and gives rules and guidelines – this book adds color to the clauses by showing practical examples of the principles of the standard in action.

In Chapter one, Nick Milton – director and co-founder of Knoco Ltd, and a member of the ISO working group for the standard – describes the genesis of ISO 30401, and the various decisions and processes that needed to be followed before the standard was fully drafted, approved, and released. Nick details the national and international bodies that were involved in the drafting process, and the consultative processes adopted to maximize input from KM professionals around the world, including a period of public consultation. He also describes the nature of the document as being a standard for the management system by which

KM is governed, rather than a standard approach for managing knowledge. This has major implications over how the standard is applied, and sets constraints on the text within the body of the standard itself.

Chapter two then looks at the eight guiding principles of the standard, which provide a useful checklist for developing or assessing KM in legal practice. This chapter, by Karen Battersby, director of knowledge management at national UK firm, Freeths, examines each of the principles in detail and looks at ways in which law firms already do, or potentially could, implement and embed them within their KM strategies and practice.

The case studies section of the book begins with chapter three by Liz Hobbs of Transport for London (TfL). Following the 2012 London Olympics, TfL underwent a "Transformation Program" called Project Horizon. During this process the Horizon team identified that the organization was not learning lessons or transferring knowledge from project to project. The new Program Management Office (PMO) structure included, for the first time, a knowledge management team to implement systems, processes and most importantly, identify barriers to learning within the organization.

In order to achieve the outcomes identified for the new program, it was essential to understand the organization and the outcomes it was looking to deliver.

As section 4 of the KM Standard identifies, culture is critical to the effectiveness of knowledge management. A pan-TfL working group was therefore formed to establish a baseline, following which a strategy was developed to determine the scope of the new KM system. The output identified that the organization needed a multi-faceted approach rather than just introducing a lessons learned repository. TfL's journey began from that point onwards.

In chapter four, Libbie Evans and Meghna Shah of TD Bank, a subsidiary of the Canadian multinational Toronto-Dominion Bank, describe how TD Legal designed its matter management system (people/process/technology) to advance the bank's knowledge management objectives. Discussing knowledge development and the knowledge lifecycle, the authors look at how the matter management system became the foundation of its KM system.

In chapter five, Dr Peter Brown – head of performance knowledge for the English Institute of Sport (EIS) and director of the knowledge management consultancy, the Knowledge Podium – describes how the EIS brings to life the knowledge management enablers of its knowledge management system as described in section 4.4.4 of ISO 30401.

The chapter describes the context, nature, and the breadth of knowledge within the EIS and how this is understood and applied to enhance the performance of Great Britain's Olympic and Paralympic athletes on a daily basis. It explains how within the EIS, organic knowledge management succeeds, despite it being voluntary for individuals and teams and with no organizational consequences for non-compliance. The chapter demonstrates how knowledge management within the EIS is viewed and applied using complex adaptive systems and applied with a constraint-led approach to rapid organizational learning.

Design and creativity are at the heart of Arup. Human capital, in the capabilities of every member of Arup staff, is the key to the firm's reputation of quality and innovative excellence. Formalizing the importance of collective knowledge, its access and transfer across to the continued success of the firm, is Arup's strategy for knowledge management, which has developed to systematically address needs on a large scale, invoking principles familiar to knowledge management practitioners, such as the sharing of lessons learned, the development of communities of practice and the user-driven development of knowledge tools to support expertise and good practice sharing.

In chapter six, Dominique Poole Avery and Elena Costello at Arup, provide practical insights into how to encourage and stimulate a culture that intrinsically supports strong knowledge management practices, to better identify critical knowledge programs relevant to needs, and to mobilize senior sponsorship to build an open and collaborative global organizational culture on a large scale.

In chapter seven, Karen Elson, a major projects consultant and chartered engineer with more than 20 years' experience in public and private sector projects, looks at the subject of leadership. The learning legacies for London 2012 and Crossrail were hailed by industry leaders as best practice examples in driving a learning environment for the continued improvement of major projects. Learning legacies share learning from major projects to improve project outcomes, raise the bar in industry, and showcase UK PLC.

At Crossrail, learning legacy was seen as part of the corporate objective to be "world class" and was rolled down into program, project, and personal objectives.

Chapter eight looks at planning and operating KM. Rupert Ashley Lescott, specialist in knowledge management at DEWA – the Dubai Electricity and Water Authority – looks at how to use KM to plan against risks and opportunities, and how testing, adapting and innovating enable long-term KM capability development.

Section 10.2 of ISO 30401 states that the organization shall continually improve the suitability, adequacy, efficiency and effectiveness of its knowledge management system, and use monitoring, measurement, analysis and evaluation to do so. In chapter nine, Darryl Wing, director of knowledge management at Fluor Ltd, discusses how the organization changed the way it structured its Lessons Learned program to resonate better with staff.

By renaming the program "Project Experiences and Lessons Learned" with the instruction that any Fluor employee should submit an experience if they felt its outcome could benefit other projects, the company was much more able to engage its learners.

What continues to work well is the capture and promotion of success stories that work their way into the fabric of the organization. Over time, the hope is that employees won't question whether completing the experience submittal and approval process is worth the time because the culture of the organization puts such an expectation on improvement that it's simply a natural part of their work process.

Chapter ten discusses current and future trends in knowledge management. Authors Patrick DiDomenico, chief knowledge officer of Ogletree, Deakins, Nash, Smoak & Stewart, PC, and James Lee, CEO and co-founder of LegalMation, share their views on this topic in light of their recently-formed partnership. They discuss the recently-published ISO standard and how it will impact or cultivate information sharing and innovation. Using Ogletree Deakins as a case study, the authors discuss how knowledge development is cultivated via the leaders and enablers within the context of its firm culture as they evaluate and adopt innovative platforms such as LegalMation.

To conclude the book, Dave Snowden, chief scientific officer at Cognitive Edge, looks at the Standard with a critical eye, asking if it will actually do what the KM community needs it to do.

This concluding chapter examines the latest knowledge management standard through this lens. Does it have utility? If so, what are its limits?

This book shows you ISO 30401 in application, enabling you to decide whether you should apply it to your own organization, wholly or in part. More crucially, *A Guide to Global Best Practice and Standards in KM* allows you to benchmark your own knowledge initiatives against best in breed global examples.

About the authors

Karen Battersby is the director of knowledge management at national firm, Freeths, and is responsible for the firm's knowledge management, library, and legal learning and development. She has many years' experience in knowledge management, as well as a commercial lawyer, having practised both in private practice and in-house. Karen is an experienced lecturer and trainer, having taught everything from legal CPD courses to MBA qualifications to lawyers and other professionals. She has also taught KM at MBA level at Henley and she established the UK's first postgraduate qualification in knowledge management for legal practice at Nottingham Law School. Karen also developed one of the UK's first webinar and online learning businesses for the legal profession.

Dr Peter Brown is head of performance knowledge at the English Institute of Sport, the science, medicine and technology provider to GB Olympic and Paralympic athletes, and works with all departments of the UK high performance system to drive the design and delivery of the knowledge management and organizational learning strategy.

Peter is also the founder and director of knowledge management and organizational learning consultancy, the "Knowledge Podium," where, using a unique complex adaptive systems lens, he advises elite sport and high performance organizations on accelerating knowledge transfer and rapid learning to maximize their organizational capability.

Peter has worked with many of Great Britain's Olympic and Paralympic sports. He worked with Team GB and Paralympics GB in the preparation for the Rio 2016 Olympic Games and leads the Team GB approach to knowledge transfer for the Tokyo 2020 Olympic Games. He has over 15 years' consulting in high performance sport. Peter has been invited to speak at numerous KM and workplace learning conferences, has published peer-reviewed journal articles related to sport, complexity, and learning and is an authorized CYNEFIN trainer.

Elena Costello is an expert in knowledge management; combining her formative career as a project engineer and qualifications as a project manager to ensure a relevant foundation of knowledge management that brings added value to projects. In addition to having delivered a wide range of multidisciplinary projects in energy, education, transport, maritime, and healthcare sectors, Elena has steered the direction of internal and external knowledge management consulting work as well as research. In taking a project benefits and result-oriented approach, she has managed the successful engagement of critical stakeholders to successfully develop various programs within Arup's knowledge management strategy, while working on external knowledge management consulting commissions.

Patrick DiDomenico is chief knowledge officer for Ogletree, Deakins, Nash, Smoak & Stewart, PC, an international labor and employment law firm with 900 attorneys in more than 50 offices. Patrick also serves on the firm's technology strategy committee, research and development council, and innovation summit committee. Before his knowledge management career, he was a practicing litigation attorney for more than eight years. Author of the book "Knowledge Management for Lawyers," published by the American Bar Association, Patrick has been in the legal knowledge management industry since 2005. He is the recipient of the 2013 ILTA Knowledge Management Professional of the Year Award.

In his spare time, Patrick publishes the LawyerKM blog (www. LawyerKM.com), tweets as @LawyerKM, manages the 10,000 member Knowledge Management for Legal Professionals LinkedIn group, the 6,700 member Legal Project Management LinkedIn group, and the 600 member Artificial Intelligence for Legal Professionals LinkedIn group, all of which he founded. He is a fellow in the College of Law Practice Management, a frequent speaker on KM, legal technology, and legal innovation topics, and an advisor to legal technology start-ups.

Karen Elson is a major projects consultant and chartered engineer with more than 20 years' experience in public and private sector projects. She has led the implementation of innovative and award winning learning legacy programs across the UK's construction industry, including the Olympics, Crossrail, the Major Projects Knowledge Hub, and more recently developing the brief for learning legacy on the Palace of Westminster refurbishment and renovation program. Karen runs her own management consultancy business with two business partners and a select group of associates, delivering improvements in major projects through focus on knowledge, networks, and behaviors.

Liz Hobbs, project manager for London Overground, has more than 18 year's experience in the transport sector involved in major projects and has taken Transport for London (TfL)'s knowledge management initiative from a standing start to embedding the strategy within the first four years. She is responsible for driving the transformation of the culture, systems, and processes that underpin the successful delivery of knowledge management in the organization. She has developed the use of lessons learned plans and strategies and seen successful implementation show that learning has created efficiencies and savings across the organization.

Being passionate about knowledge sharing, Liz is a member of a number of external groups, including the Crossrail Learning Legacy Executive Steering Group.

James M Lee is co-founder and CEO of LegalMation. He is a founding partner of LTL Attorneys LLP, a nationally recognized litigation boutique. As an experienced litigator, he has tried numerous cases in federal and state courts. He has been recognized as a top business litigator by various legal publications including the *National Law Journal.* James has served as lead counsel to a number of Fortune and multinational clients including Wal-Mart, Thomson Reuters, Symantec, and VIZIO. He was formerly associated with litigation powerhouse Quinn Emanuel before co-founding LTL Attorneys. He is a frequent and noted speaker and commentator in the field of AI and innovations in the field of law. At LegalMation, James serves as the key driver of the company's vision and strategy.

Nick Milton is director and co-founder of Knoco Ltd, with over 25 years' experience in knowledge management. Working with Knoco Ltd, Nick has helped develop and deliver KM strategies, implementation plans, and services in a wide range of different organizations around the globe. He has a particular interest in Lessons Learned programs, and has managed major lessons capture programs, particularly in the area of mergers and acquisitions, and high technology engineering.

Prior to founding Knoco, Nick spent two years at the center of the team that made BP the leading KM company in the world at the time; acting as the team knowledge manager, developing and implementing BP's knowledge of "how to manage knowledge", and coordinating the BP KM Community of Practice.

Dominique Poole Avery is Arup's global knowledge manager, responsible for the knowledge strategy that defines the practices, tools and

behaviors applied to achieve knowledge sharing across Arup. She has shaped technology solutions and led a range of strategic initiatives to address issues such as skills mapping, lessons learned, risks from future "brain drain" and has played a key role in shaping Arup's approach to skills networks as a primary means for knowledge transfer and skill development. Dominique originally trained as an architect. She has a PhD on the topic of Innovation in Construction: a client's perspective, in which she explored the issues that influence client decisions regarding innovative practices and solutions, and the implications of these for designers and all involved in the construction process. Dominique has presented at various conferences on knowledge management, given guest lectures at business schools, has published papers and contributed to books on knowledge management and organizational learning.

Professor Dave Snowden is director of the Cynefin Centre and chief scientific officer of Cognitive Edge. Formerly a director of the IBM Institute for Knowledge Management, he pioneered an organic approach to the field and was identified by Thomas Stewart, former editor of the HBR, as one of the leading thinkers on tacit knowledge. He received a special award from the Academy of Management for his contribution to the field and his paper *Complex Acts of Knowing* is one of the ten most cited articles on the subject.

Darryl Wing joined Fluor's newly formed knowledge management team in 2000. For over a decade he worked on developing and enhancing Fluor's flagship knowledge-sharing platform, Knowledge OnLine. During that time he actively participated in extending the reach of Fluor's communities of practice. Today they continue to flourish and provide a vital location to access Fluor's global knowledge, from accessing best practices to getting project questions answered quickly by Fluor's network of subject matter experts. Fluor's KM program has received numerous accolades over the years, including multiple awards for the Most Admired Knowledge Enterprise (MAKE). In July 2013, Darryl assumed responsibility for the KM team at Fluor, and is working to drive an evolved vision of KM within Fluor.