Knowledge Sharing Toolkit

An Evolving Collection of
Practical Knowledge Sharing Techniques

DRAFT

December 6, 2004

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About this toolkit

This toolkit is designed to make it easier for you to benefit from the collective experience, knowledge and expertise of your peers, co-workers and partners, and to more effectively share the results of your work with others. The knowledge sharing techniques described in this toolkit are a selection of KS tools that are simple, quick, and proven to be effective methods for providing and promoting open, transparent discussion on topics, issues, activities and projects with which you work.

These methods, if followed properly, can help you to do your job more effectively.

We encourage you to modify and adapt these approaches to meet your own needs. This document is also designed to evolve and respond more directly to your needs, and we would strongly encourage you to provide feedback, suggestions, and further examples so we can improve this toolkit.

Bellanet < http://www.bellanet.org > is developing this toolkit with support from the Knowledge Management & Sharing project, within the ICT-KM program of the CGIAR < http://ictkm.cgiar.org >.

Please send any comments, challenges or suggestions directly to Mark Faul (mfaul@bellanet.org) and Kemly Camacho (kcamacho@bellanet.org).

Contents

Future Topics:

Mailing lists; Online Community Spaces; Knowledge Fairs; Yellow Pages; Mentorship; Coaching; Exit Interviews; Workshops; Meetings; Best Practices; Intranets; Social Network Analysis; Knowledge Audits; KM Strategies; Open Space; Learning Histories; Life Stories.

Peer Assists

Learn from the collective experience of your peers

What are Peer Assists?

A peer assist is a meeting that brings together a group of peers to get feedback on a problem, project, or activity. The meeting seeks to learn from participants' knowledge and experience with topics related to the problem, project or activity. A peer assist can happen before an activity to help with the planning process, or during an activity to help steer the direction.

How can Peer Assists help you do your job better?

- ✓ learn how others would approach your issue
- ✓ develop ideas and solutions to your problems with the collective input of your peers
- ✓ gain input and insights from people outside your team
- ✓ learn new approaches or methods to solving problems
- ✓ develop stronger bonds with your colleagues

How do you do a Peer Assist?

i. Before the Peer Assist

1. Clarify the purpose and define the specific challenge or problem for which you are seeking help.
2. Come up with a clear statement about the challenge or problem.
3. Talk about your peer assist plans with a colleague to help refine your plans.
4. Identify a facilitator[1] to lead the discussions (can be self-facilitated).
5. Set a time and date for your Peer Assist.
6. Invite participants with a diversity of knowledge, skills and expertise, tailored to the objectives of the peer assist.

ii. During the Peer Assist

7. Explain the purpose of the peer assist to the group.
8. Describe the context, history and future plans regarding the problem or

[1] A facilitator helps the group to ensure that the goals of the Peer Assist are achieved, by keeping discussions on topic, and helping to manage the flow of interactions between participants.

challenge.

9. Describe the problem or challenge and provide a clear question or problem statement.
10. Encourage participants to ask questions for clarification; and provide feedback by discussing what they heard, and what else they need to know.
11. Ask participants to consider what they have learned and will apply from the event.

iii. After the Peer Assist

12. Prepare an action list at the end of the meeting for follow-up activities.
13. Consider who else might benefit from the lessons learned and share the results with them (provide contact names for follow up discussions).

Tips & Cautions

- ✓ Include participants from horizontally across the organization to create a safe environment for everyone to share.
- ✓ Aim to achieve certain results from your peer assist to motivate participation.
- ✓ Set a time limit for the peer assist, and stick to it.

Example(s)

Nancy Dixon (author of “Common Knowledge”) demonstrates the peer assist with a story from British Petroleum (BP). BP has approximately 50 exploration teams working around the world. These teams consist of seismologists, geologists, petroleum engineers, environmentalists and other technical experts whose task is to assess potential drill sites and advise the company on whether to invest in drilling. In Dixon's example, Helen's team of five had been working on a site for nine months, and was unable to arrive at a recommendation. She called a peer assist by asking each member of her team for the names of three or four people "whose thinking you really trust in your area."

Armed with a list of 15 or 20 names, Helen called an assist at a particular place and time. Not everyone was available but about five came. At the session, Helen started by defining "the things we would like you to help us with." Each member of her team then presented his or her problems to the group. They explained the procedures they had followed, the tests they had run and the results that may have been puzzling them. Their peers were then asked to synthesize what they'd heard. "We're interested in recommendations," they were told, "but also in what we might have overlooked." Participants were quick to respond with queries and eager to provide parallel instances from their own experience.

The peer assist, as Dixon says, is interesting because experts are not called to make presentations about what they know. They are told, "Here is our problem," and asked, "What do you know that fits our problem?"

It's far more efficient than reading 65 reports, she says. What Helen and her team got pertained just to their problems. The peer assist also works, Dixon says, because it is not reported to management. "This was not an audit, not a review. You don't have to hide anything because this isn't going to be reported."

Source:
http://leadership.gc.ca/static/dayinthelife/learning/features/summit/dixon_nancy_e.shtml

References & Other Resources

Collison, Chris, Parcell, Geoff, *Learning to Fly* (Milford: Capstone Publishing), 2001.

Dixon, Nancy, *Common Knowledge* (Boston: Harvard Business School Press), 2000.

After Action Reviews

Learn more from your events, projects & activities

What are After Action Reviews?

An after action review (AAR) is a meeting to capture lessons learned immediately after an event, project, or an activity.

How can AARs help you do your job better?

- ✓ learn how you can do an action better the next time by reviewing and learning from the process
- ✓ analyze what didn't work the way it was supposed to work, to improve processes for your ongoing & future activities
- ✓ share your reactions and feedback with decision-makers who influence your work
- ✓ improve trust, support and confidence within your team or group
- ✓ bond more with your team or group

How do you do an AAR?

i. Before the AAR

1. Identify a facilitator[2] to help create an open environment, promote discussion and draw out lessons learned.
2. Set a time and date for your meeting.
3. Invite all members of the work team to participate in the AAR.

ii. During the AAR

4. Explain the purpose of the AAR to the group.
5. On a flipchart, write the details of "***what was supposed to happen***" in the activity/project/event.
6. Ask if the group agrees with "what was supposed to happen".
7. Discuss with the group ***why*** those were the objectives of the activity.
8. Discuss with the group ***what actually happened*** and ***why***.
9. Discuss ***why were there differences***.
10. Discuss ***what worked, what didn't work*** and ***why***.
11. With the group, identify ***what you would do differently next time***,

[2] A facilitator helps the group to ensure that the goals of the Peer Assist are achieved, by keeping discussions on topic, and helping to manage the flow of interactions between participants.

and come up with ***Specific Action Items*** as recommendations for future actions.

iii. After the AAR

12. Create a document to capture details or the AAR, and recommendations. Circulate the document to all AAR participants for their comments and feedback. After incorporating participants' feedback, share the document with other colleagues.

The template below is provided as a guide, which you may want to customize.

Name of Event	
Date of Event	
One or two sentences giving the background	
Individual(s) who called the AAR	
AAR Participants	
AAR Facilitator	
Key Words (maximum of 10 that would enable future users to re-find this learning)	
Key Dates (the years that the learning was acquired)	
Specific Actionable Recommendations (SARs)	Quotes

Tips & Cautions

- ✓ AARs should be carried out immediately after an activity or event, while the team is still available and memories are fresh.
- ✓ Post the sets of questions on a flip chart or white board to be briefly reviewed prior to seeking out the answers.
- ✓ Create a positive environment to ensure that AARs are used to promote learning and make it explicit rather than on seeking out individuals to blame for past failures.

- ✓ There are different ways to conduct AARs. You should attempt to keep the process as simple as possible.
- ✓ Arrange in advance, for an individual to capture the quotes connected to each recommendation

Example(s)

Name of Event	CGIAR KS Workshop
Date of Event	June 22-25, 2004
One or two sentences giving the background	Developing a shared understanding of KS within the CGIAR;
Individual(s) who called the AAR	Doug Horton, Mark Faul
AAR Participants	
AAR Facilitator	Mark Faul
Key Words (maximum of 10 that would enable future users to re-find this learning)	Knowledge sharing, Columbia, CIAT, ICT-KM project
Key Dates (the years that the learning was acquired)	2004
Specific Actionable Recommendations (SARs)	Quotes
	• allocate more preparation time before the workshop for participants to generate proposals with centers/groups • include real-time teleconferences for brainstorming with other CGIAR staff not at the workshop • include time in the agenda for skill building or learning sessions

References & Other Resources

Collison, Chris, Parcell, Geoff, *Learning to Fly* (Milford: Capstone Publishing), 2001.

Darling, Marilyn J., Parry, Charles S., *From Post-Mortem to Living Practice: An in-depth study of the evolution of the After Action Review* (Boston: Signet Consulting Group), 2001.

Whiffen, Paul, “Seizing Learning Opportunities at Tearfund,” *Knowledge Management Review*, Nov./Dec., 2001

Retrospect

Learning after your events, projects & activities

What is a Retrospect?

A retrospect is an in-depth discussion that happens after the completion of an event, project, or an activity to capture lessons learned during the entire activity. A retrospect helps individuals involved reflect upon and learn what happened, why it happened, what went well, what needs improvement and what lessons can be learned from the experience.

How can a Retrospect help you do your job better?

- ✓ learn how you can do a similar activity better the next time by reviewing the process and lessons learned
- ✓ bring closure to your project or activity, and inform an evaluation process
- ✓ learn as much about your project or activity from your team before they disband
- ✓ create a documented review of your project process

How do you do a Retrospect?

i. Before a Retrospect

1. Identify a facilitator[3] to help create an open environment, promote discussion and draw out lessons learned.
2. Set a time and date for your meeting.
3. Invite all members of the team to participate in the Retrospect.

ii. During a Retrospect

4. Introduce the topic of the Retrospect, and ensure that all participants are clear about the objectives of the Retrospect.
5. Identify and ***review the objectives and deliverables*** of the project.
6. Identify and ***review the project plan and planned process***.
7. Discuss ***what went well*** and ***why***.
8. Discuss ***how what worked can be applied in the future***.
9. Discuss ***what could have gone better***, and ***why***.

[3] A facilitator helps the group to ensure that the goals of the Peer Assist are achieved, by keeping discussions on topic, and helping to manage the flow of interactions between participants.

iii. Report on Results

10. Once the document is complete, make sure that it is circulated to all retrospect participants for their comments and feedback.
11. Circulate the recommendations to other staff for their use and reference.
12. Revisit the recommendations at a later date so they continue to inform your work.

The template below is provided as a guide, which you may want to customize.

Name of Event	
Date of Project/Activity	
History of the project or activity (context)	
Individual(s) involved in the project	
AAR Participants	
AAR Facilitator	
Key Words (maximum of 10 that would enable future users to re-find this learning)	
Recommendations for the future	Quotes

Tips & Cautions

- ✓ Arrange in advance for an individual to capture the meeting recommendations
- ✓ Create a positive environment to ensure that retrospects are used to promote learning and make it explicit rather than on seeking out individuals to blame for failures
- ✓ There are different ways to conduct retrospects. You should attempt to keep the process as simple as possible.

Example(s)

Name of Event	Knowledge Sharing Project

Date of Project/Activity	2003-2004
History of the project or activity (context)	Establishing a knowledge sharing culture within our organization to encourage more transparent sharing of knowledge and information.
Individual(s) involved in the project	KS project team
AAR Participants	KS project team
AAR Facilitator	
Key Words (maximum of 10 that would enable future users to re-find this learning)	Knowledge sharing, strategy, culture
Guidelines for the future	• Use practical and simply KS/M tools • Work with HR department • Introduce change slowly and gradually

References & Other Resources

Collison, Chris, Parcell, Geoff, *Learning to Fly* (Milford: Capstone Publishing), 2001.

Online Communities

Tapping into the collective knowledge of a group

What are Online Communities?

Online Communities are groups of people who interact in an online environment to discuss and share resources around a common topic. One type of online community is a Community of Practice (CoP), which are "groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis" (Wenger, 2002).

How can COPs help you do your job better?

- ✓ Tap into the knowledge of a large community of experts who are passionate about a topic
- ✓ Share your ideas, questions and issues and get feedback from the community
- ✓ Connect with people from outside your group or organization to learn from the experiences of others
- ✓ Interact quickly and efficiently with people in virtual communities
- ✓ Build community identity and reputation for networking

How do you do use COPs?

Participating in COPs:

COP participants get involved in varying levels. Some people "lurk" in groups to listen-in on discussions and learn from the contributions of others. Other people make occasional contributions in response to others, or with their own inputs. Some participants are very active, with regular contributions to discussions, sharing content, or in organizing face-to-face events. Your level of participation should be determined by your passion and interest to get involved.

You can find a listing of many different online communities, discussing a range of different development topics through Dgroups (a partnership supporting development dialogues) at: http://www.dgroups.org/

Organizing COPs:

Organizing a new COP is a more complicated and time consuming process that requires a lot of dedication and commitment. Before deciding to start a new COP, first determine if there is **potential**:

- What is the primary intent of the community?
- Is there already a community that already exists?
- Do you have a group of interested participants that are passionate about the topic?
- For management buy-in the CoP should support core organizational functions (top management buy-in is a helpful but not sufficient condition for the success of the CoP).
- Identify a facilitator(s) to lead the discussions, and potential key contributors (or champions)

Getting started with your COP (role of the facilitator):

- Identify engaging issues that people will be passionate about, as specific topics for discussion.
- Mobilize or redirect efforts that are already there: link to or empower existing groups
- Have a plan of action for moving forward with your COP – what you (and the group) would like to achieve, or help participants achieve
- Initiate community events and spaces (regular face-to-face meetings, online meetings, online group space)

Tips & Cautions

✔ COPs require time commitment to work well, so be prepared to dedicate time to get some value from your COP

Example(s)

The KM4Dev (Knowledge Management for Development) community of practice has been around for many years now. Participants include people from a broad range of different development organizational associations, including government, bilateral, multilateral, non-government and civil society. All participants have a professional interest and a passion for knowledge management issues. Discussions are very vibrant and active, with regular ongoing dialogues through the online space. The group also meets face-to-face on a yearly basis.

The group can be found at: http://open.bellanet.org/km/

References & Other Resources

Wenger, Etienne, McDermott, Richard, Snyder, William, *Cultivating Communities of Practice* (Boson: Harvard Business School Press), 2002.

TEMPLATE

Knowledge Sharing Approach

"Marketing" 1-liner to help people understand the approach better

What is the KS Approach?

Briefly describe the approach (in 2-3 sentences)

How can Storytelling help you do your job better?

- ✓ Practical ways that the approach can help someone do his/her job
- ✓ List of bullet points

How do you do the KS Approach?

Step-by-step instructions describing how to implement the approach.

Could include:

- how to prepare
- why to use the approach
- when to use the approach
- how to use the approach (steps in doing the approach)
- what to do after using the KS approach

Tips & Cautions

- ✓ A list of things to be aware of, or plan for in advance

Example(s)

A practical example of the approach being used (include reference if appropriate).

References & Other Resources

References and other resources for further information on the approach.