# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.
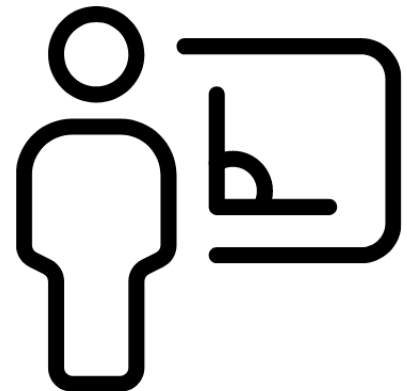
Module Two: Understanding Knowledge Management

The words knowledge and management are two very broad concepts when separated. When the two words come together, it speaks of a concept that strives to organize information in a way that produces an advantage for any organization. While anyone would think that harnessing the knowledge of an organization is a positive thing to do, there are many who do not see the value of knowledge management. They may see KM and other disciplines, like project management, as a waste of time. Many see planning and assessing risk as time consuming; therefore, they do not support initiatives that bring forth this change. In all honesty, change is the real issue.

This course will give you the tools to present knowledge management to your organization in the most positive way, in order to gain the right support so it will thrive in your organization. The more information you can share with your organization about knowledge management the more apt they are to accept it. This module explains the principles, history, and application of knowledge management in the workplace. This will be the base on which we will build throughout the entire workshop.

What is Knowledge

The word knowledge is often confused with information or data. The online version of the Merriam-Webster dictionary defines knowledge as the following: *Fact or condition of knowing something with familiarity gained through experience or association.*

Later in this workshop, there will be a discussion on what data and information is. Both of these terms are a part of knowledge. Data is raw content, which by itself has no meaning or value.

When data is grouped together, it becomes information. For example, getting a temperature reading of the climate outside on one day is meaningless without other information to make a comparison.

Once a database is created, it becomes information because comparisons can be made. In terms of knowledge management, knowledge is information that is in context, producing an actionable understanding.

Back to our temperature scenario: when the temperature information is placed in context with, say agriculture, then knowledge is created. For example, knowing that if temperatures fall below a certain point in January they tend to last for about a week. Orange farmers in Florida must determine if they are going to harvest early or take other precautions like heating the orchard. The decision will be based on how long oranges can withstand cold conditions at a certain temperature.

Organizations and companies hold and transfer data and information that can be placed into context allowing an actionable event or an understanding to occur.

Estimated Time	5 Minutes
Topic Objective	Participants will define the meaning of knowledge
Topic Summary	Knowledge is the collection of information that is organized in a way that is meaningful enough to the organization to produce action.
Materials Required	Flip charts, markers and tape
Planning Checklist	Have enough flip charts and makers near each table in the classroom.
Recommended Activity	1. Tell participants that they are going to write down as many meanings of the word knowledge 2. Have teams pick a scribe 3. Tell the teams that you are going to go around the room and have them share their thoughts 4. Give them 2 minutes to brainstorm meanings 5. Debrief by giving each table a turn to share one meaning they have written 6. Take each team's paper on to the wall 7. Debrief by going over the discussion points
Delivery Tips	Remember to have one team share one answer then go to the next team. This will ensure everyone has a chance to submit an answer.
Review Questions	**Q:** What is the purpose of knowledge?

A: To produce action	

What is Knowledge Management

Knowledge management is a program or system designed to create, capture, share and leverage knowledge towards the success of the organization. This is easier said than done because instituting a knowledge management program requires many changes and support at all levels of the organization. Furthermore, there are different forms of knowledge to contend with and understand.

Knowledge can be tacit or explicit, which requires different strategies to capture each type. Another challenge is to distill the practice of knowledge management into one neat concept.

This course will provide you with the specific understanding you need to take away a good conceptual framework of knowledge management. This way you can communicate and manage a knowledge management project with the tools for success.

Estimated Time	10 Minutes
Topic Objective	Participants will define the meaning of knowledge management (KM).
Topic Summary	Knowledge management is harvesting information from within and from outside the organization and taking that information and turning it into knowledge that is shared and utilized to create or repeat success.
Materials Required	Worksheet 1: Knowledge Management Defined, sticky notes, pens
Planning Checklist	Print enough worksheets for all participants Have enough sticky notes and pens/pencils at each table
Recommended Activity	1. Have tables choose a scribe 2. Instruct participants to come up with a definition of KM as a team 3. Allow 3-5 minutes 4. Have scribe write team's definition on sticky note 5. Collect them 6. Share definitions with the class

	7. Distribute worksheet
	8. Go over discussion points
Review Questions	What were some of the common aspects among all the definitions given?
	• A system
	• A database
	• A bank of information

A Brief History

The origins of knowledge management can be traced back to the late 1970s. Everett Rogers' and Thomas Allen's work in information transfer laid the foundation for the concept of how knowledge is created, implemented, and integrated throughout an organization.

In the 1980s, knowledge became a focal point to increasing the competitive edge for companies. People like Senge and Sakaiya discussed the advantages of creating learning and knowledge based organization. The primary object during this time was improving business in general.

In the 1990s, knowledge management was introduced into mainstream business management publications. Authors like Tom Stewart, Ikujiro Nonaka, and Hirotaka Takeuchi brought formality to the managing of knowledge. In the mid 1990's, the Internet became the channel where knowledge management expanded greatly.

The history of knowledge management has many prominent theorists like Karl Wiig, Peter Drucker, and Paul Strassmann. From information technology, to improving how an organization learns, knowledge management started in many areas of business. There is no one source of its history. Nonetheless, knowledge management has a history of producing the kind of change businesses desire in terms of improving the communication of knowledge in order to achieve successful outcomes.

Today, knowledge management has many applications and is useful in most any discipline in an organization.

Estimated Time	5 minutes
Topic Objective	Participants will understand the history of knowledge management.
Topic Summary	The origins of knowledge management began in many areas of management.

Materials Required	Worksheet 2: Knowledge Management History
Planning Checklist	Print enough worksheets for all participants Become familiar with the major historical milestones on worksheet
Recommended Activity	1. Distribute worksheets 2. Go over discussion points 3. Have participants fill in the worksheet as you discuss the history of KM
Delivery Tips	Write the major historical points on a board or flip chart. Participants can copy the information onto their worksheet.
Review Questions	Who is credited with the theory of knowledge management? • There is no one sole person credited with knowledge management. It evolved in many areas of management with multiple contributors.

Applications in the Workplace

Knowledge management can be applied to many areas of the organization. Remember that knowledge management is not only storing knowledge; the larger focus is on sharing. With this in mind, applying knowledge management in the workplace is nearly unlimited. Areas that can benefit from knowledge management are as follows:

- Corporate governance

- Staff training

- Operations

- Human resources

- Marketing

- Information technology

- Research and development

Applying knowledge management in any one of these areas will lead to improved communication and responsiveness to change. Here are some potential benefits to implementing knowledge management:

- Encourage innovation by allowing ideas to flow throughout the organization

- Improve customer experience by becoming more efficient in service

- Increase profits by capitalizing on opportunities because of faster product-to-market time

- Increase retention rate of employees because of recognition and reward for their valuable knowledge input

- Reduce cost through improved internal efficiencies

Estimated Time	10 Minutes
Topic Objective	Participants will identify areas to apply knowledge management in the workplace.
Topic Summary	There is no limit to applying knowledge management in the workplace. The following are possible areas to consider: • Governance • Staff functions • Operational s • Marketing • Information technology
Materials Required	Worksheet 3: Knowledge Management Application, sticky notes, flip chart, tape
Planning Checklist	Print enough worksheets for all participants
Recommended Activity	1. Have participants work as a team 2. Have them choose a table leader 3. Distribute worksheets 4. Allow them 3-5 minutes to complete worksheet 5. Ask table leaders to jot down best responses 6. Have leaders share their best answers with the group 7. Write down answers on a piece of flip chart, tape it to the wall

Review Questions	What areas in your organization do you see knowledge management the most applicable?
	• Have participants share their thoughts.

Practical Illustration

Jamie wrestled with a big problem that he thought had no solution. Jamie was given a complicated problem to solve, but had been left empty-handed when it came to how to solve it. Jane caught wind of his dilemma and offered to lend him her ear. Together, they deduced that crucial information was in plain sight. An idea popped into Jamie's head and suddenly they were off to the races. Jamie and Jane uncovered the facts and found the hidden solution to Jamie's once impossible-to-solve problem. Jamie, now armed with a solution, could conquer the problem and no longer felt like he'd been anchored down in a sea of puzzles too hard to solve.

Module Two: Review Questions

1.) When the two words _____ and understanding come together, they speak of a concept that strives to organize information in a way that produces an advantage for an organization.

   a) Knowledge
   b) Allege
   c) Patronage
   d) Privilege

   The words knowledge and management are two very broad concepts when separated. When the two words come together, it speaks of a concept that strives to organize information in a way that produces an advantage for any organization.

2.) There is value in _____ knowledge.

   a) Harnessing
   b) Menacing
   c) Trivializing
   d) Monopolizing

   While anyone would think that harnessing the knowledge of an organization is a positive thing to do, there are many who do not see the value of knowledge management.

3.) Many see planning and assessing _____ as time consuming.

   a) Judgment
   b) Damage
   c) Risk
   d) Potential

   Many see planning and assessing risk as time consuming; therefore, they do not support initiatives that bring forth this change.

4.) The more _____ you can share with your organization about knowledge management, the more apt they are in accepting it.

   a) Information
   b) Confusion
   c) Trepidation
   d) Energy

   The more information you can share with your organization about knowledge management the more apt they are to accept it.

5.) This definition describes what word? Fact or condition of knowing something with familiarity gained through experience or association.

   a) Sustainability
   b) Knowledge
   c) Courage
   d) Denial

   Merriam-Webster dictionary defines knowledge as the following: *Fact or condition of knowing something with familiarity gained through experience or association.*

6.) _____ is raw content.

   a) Memory
   b) Periodicals
   c) Data
   d) Narcissism
   Data is raw content.

7.) Raw content by itself has no meaning or _____.

   a) Rhyme
   b) Value
   c) Reason
   d) Senses
   Data is raw content, which by itself has no meaning or value.

8.) When data is grouped together, it becomes _____.

    a) Useless
    b) Powerful
    c) Information
    d) Hopeless

When data is grouped together, it becomes information.

9.) For example, getting a temperature reading of the climate outside on one day is _____ without other information to make a comparison.

    a) Meaningless
    b) Ridiculous
    c) Incredulous
    d) Auspicious

For example, getting a temperature reading of the climate outside on one day is meaningless without other information to make a comparison.

10.) Once a _____ is created, it becomes information because comparisons can be made.

    a) Connection
    b) Database
   c) Friendship
    d) Motive

Once a database is created, it becomes information because comparisons can be made. In terms of knowledge management, knowledge is information that is in context, producing an actionable understanding.
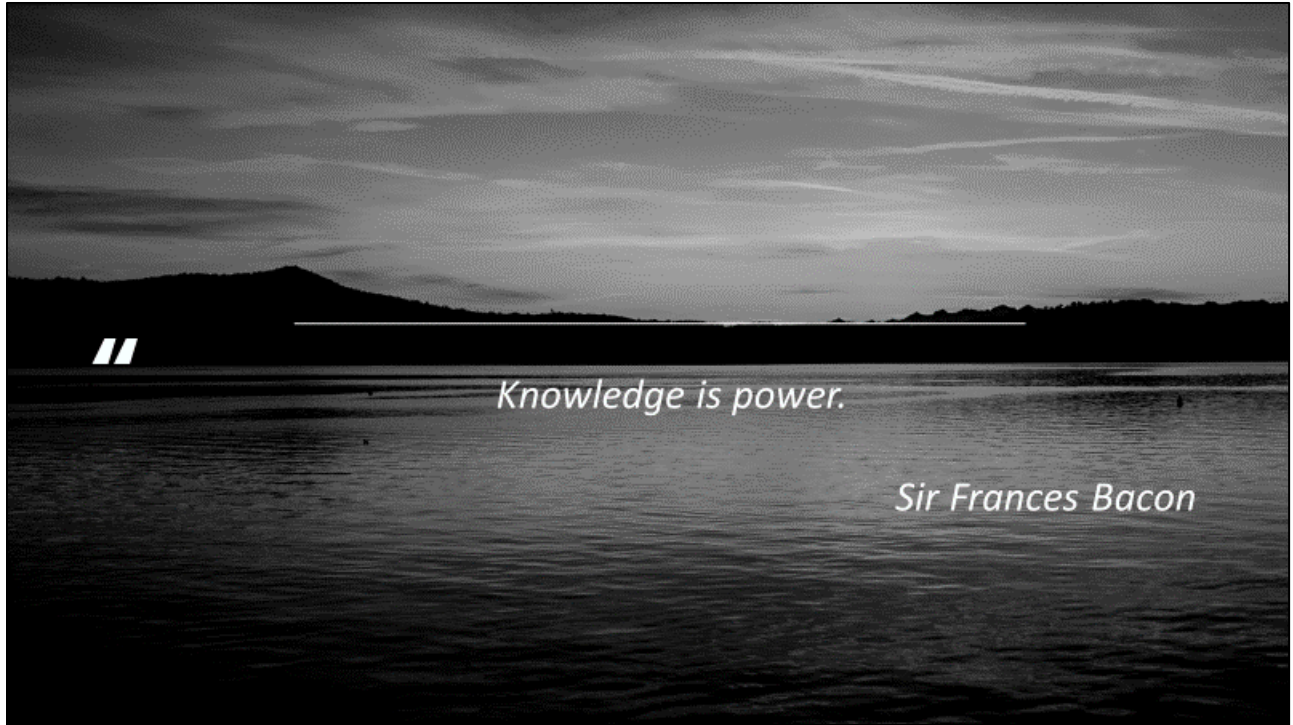
PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

> *Knowledge is power.*
>
> *Sir Frances Bacon*
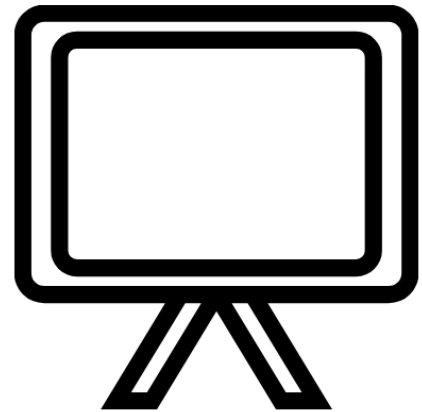
Understanding Knowledge Management

While anyone would think that harnessing the knowledge of an organization is a positive thing to do, there are many who do not see the value of knowledge management.

What is Knowledge

In terms of knowledge management, knowledge is information that is in context, producing an actionable understanding.

What is Knowledge Management

This way you can communicate and manage a knowledge management project with the tools for success.

A Brief History

From information technology, to improving how an organization learns, knowledge management started in many areas of business.

Applications in the Workplace

- Corporate governance
- Staff training
- Operations
- Human resources

Practical Illustration

- What is Knowledge
- What is Knowledge Management
- A Brief History
- Applications in the Workplace

Module Two: Review Questions

1. When the two words _____ and understanding come together, they speak of a concept that strives to organize information in a way that produces an advantage for an organization.

A. Knowledge

B. Allege

C. Patronage

D. Privilege

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Knowledge Management
Quick Reference Sheet

Applications in the Workplace

Knowledge management can be applied to many areas of the organization. Remember that knowledge management is not only storing knowledge; the larger focus is on sharing. With this in mind, applying knowledge management in the workplace is nearly unlimited. Areas that can benefit from knowledge management are as follows:

- Corporate governance
- Staff training
- Operations
- Human resources
- Marketing
- Information technology
- Research and development

Applying knowledge management in any one of these areas will lead to improved communication and responsiveness to change. Here are some potential benefits to implementing knowledge management:

- Encourage innovation by allowing ideas to flow throughout the organization
- Improve customer experience by becoming more efficient in service
- Increase profits by capitalizing on opportunities because of faster product-to-market time
- Increase retention rate of employees because of recognition and reward for their valuable knowledge input
- Reduce cost through improved efficiencies

Data, Information, Knowledge

Knowledge is composed of data and information. Here is a brief summary of each component:

- Data is bits of content in either text or numerical format. By itself, data has no meaning.
  - A finance company could collect credit scores from all their approved applications. The individual credit score does not mean much by itself.
- Information is data that is accumulated to allow comparison, grouping, and categorizing, which enables the content viewer to determine what to do with the data group.
  - The credit scores collected in the last example are accumulated and categorized into high, medium, and low risk according to the credit score number.
- Knowledge is taking the information and putting context around it, making it actionable.

If the finance company is trying to meet a regulation on how many risky loans are permitted in the loan portfolio, they may calculate the percentage of high-risk loans to the total loans on the books. The results could guide the company to find new strategies to reduce the number of risky loans, or help them maximize the risk because the risky loans are more profitable.

Acquisition

The acquiring stage seeks to obtain information from both internal and external sources.

- Explicit: information may be used in combination to form new knowledge and may be internal or external
  - Repositories with document information
  - Filing systems

- Tacit: information exist between people or experts and stored information and may be internal and external
  - Experts sharing their ideas
  - Databases with information

- Internal tools for knowledge creation/capturing
  - Interviewing employees
  - Knowledge teams

- External tools for information/knowledge capturing
  - Data mining data warehouses

External expert opinion (i.e. consultant)

Integration

Integration is making knowledge known. There are several general methods to getting knowledge out throughout the organization. Here are several examples:

- **Broadcasting:** e-mails, announcements, newsletters, are some examples of integrating knowledge by broadcasting

- **Searching:** databases, portals, extranets, records, are examples of integrating knowledge by making it searchable

- **Teaching:** classroom, webinars, computer-based training, are examples of how training can help integrate knowledge throughout the organization

- **Sharing:** best practices system, community boards, are examples of how sharing knowledge helps to integrate it throughout your organization
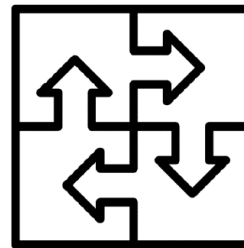
Knowledge Management Endgame

Your knowledge management project should address one or more of the following areas to help ground it to a more common business strategy: **Change management, Best practices, Risk management, Benchmarking, Increasing efficiency, Increased quality.**
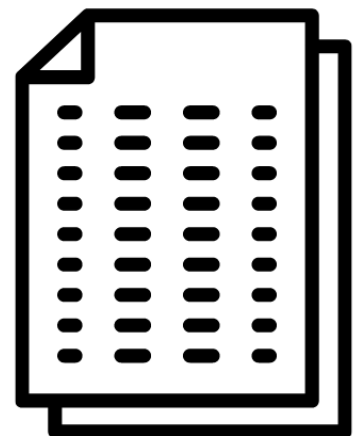
Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.

Sample Worksheet 1

Knowledge Management Defined

Knowledge management is a program or system designed to create, capture, share, and leverage knowledge towards the success of the organization.

The origins of knowledge management can be traced back to the late 1970s.

Sample Worksheet 2

Knowledge Management History

The origins of knowledge management can be traced back to the late 1970s

1970's		1990's	
Rogers & Allen pioneered KM	Senge & Sakaiya Learning Org.	Nonaka & Takeuchi Formalize KM	Wiig, Drucker & Strassman IT Takes KM to next level
	1980's		Present

Sample Worksheet 3

Knowledge Management Application

Knowledge management can be applied to many areas of the organization.

Below is a list of areas that can benefit from knowledge management.

- Corporate governance

- Staff training

- Operations

- Human resources

- Marketing

- Information technology

- Research and development

Notes

Icebreaker: Team Trinkets

PURPOSE

It is important that participants are as comfortable as possible. This activity will help participants get to know each other while doing a team building task.

MATERIALS REQUIRED

- Paper plates

- String

- Single hole punch

- Flip chart or banner paper

- Legal-sized paper (or blank name tents)

- Colored markers

- Craft supplies (scissors, glue, sparkles, yarn, etc.)

ACTIVITY

Ask participants to number off to create groups of six to eight. Their task is to come up with a team name and slogan, preferably based on something that they all have in common. They should then create two of the following items:

1. Name cards for each participant

2. Team sign

3. Team hats

4. Team work area

5. Team song

Give participants about ten minutes for this task.

PRESENTATIONS

After all groups have completed the task, ask each group to present their team name, slogan, and items, and to explain how they arrived at a decision for each. Ask participants if conflicts arose over choices, and how those conflicts were managed.
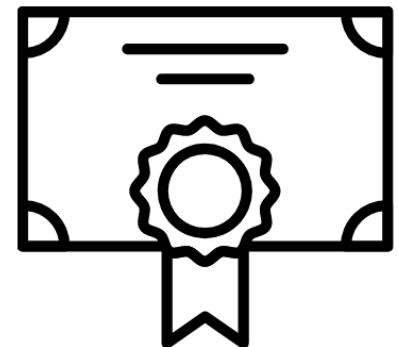
Encourage groups to work together throughout the day and strengthen their bond.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course
Knowledge Management

Awarded this _____ day of _____ e _____, 20 _____

_____

Presenter Name and Title