

# A Learning & Knowledge Framework for a Chaotic World



*An e-Book by*  
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# Introduction

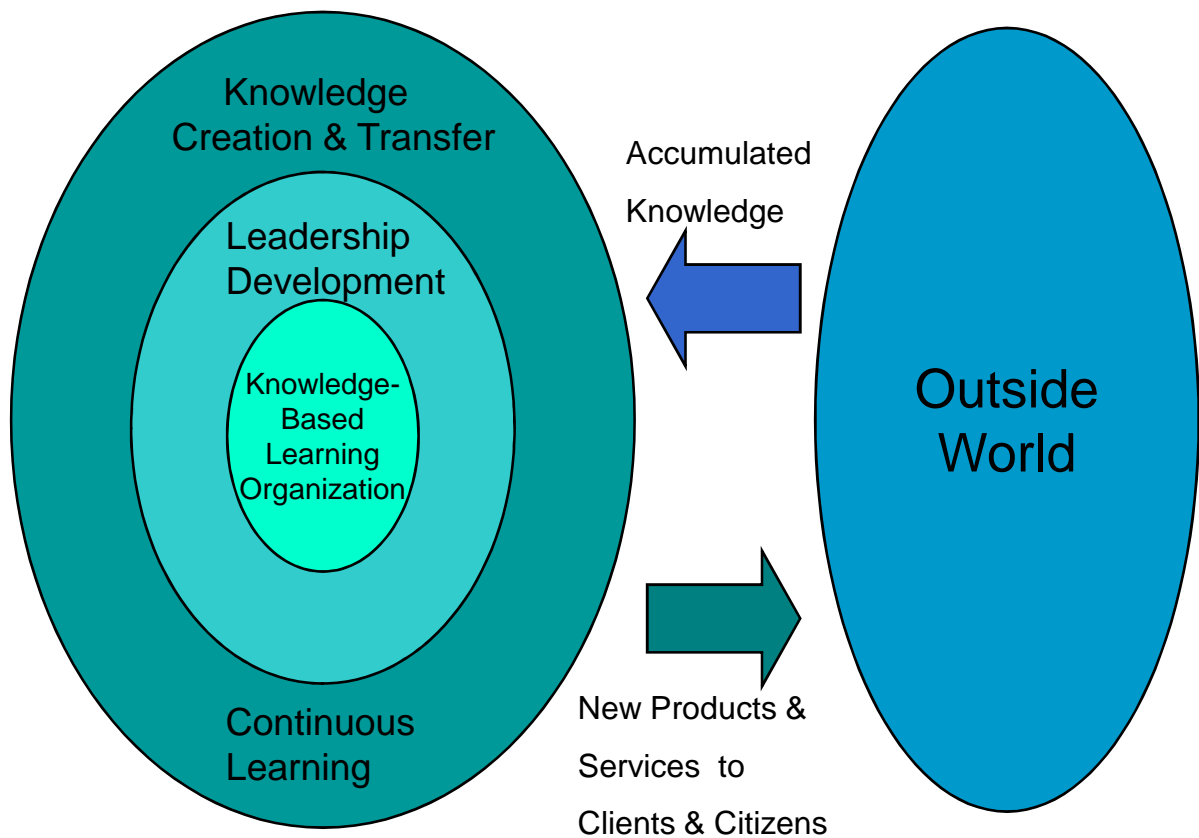
This framework outlines an overarching approach to learning, knowledge creation and transfer in organizations, whether private, public sector or non-profit. In developing it, I wanted to address the many inter-connected issues facing organizations as a result of unrelenting global change— technology, an ageing population, a multi-generational racially diverse workforce, emerging economies, climate change and so forth.

Of particular note—and indeed the reason for creating this framework—is to contribute my knowledge and experience as a means to open up conversations among people in organizations and communities. Our many challenges will only be solved if we talk to one another and develop shared solutions.

The framework provides a model for enhancing personal mastery, team learning, adaptability to change, and understanding the context in which people function in the midst of chaotic change. It also includes methods on how to put into practice knowledge creation and transfer.

Let's look at a simplified diagram on the next page to illustrate what I'm talking about.

# Global Learning & Knowledge Context



Organizations are not closed systems; they operate in the context of the real world. *Knowledge creation* is achieved through such means as:

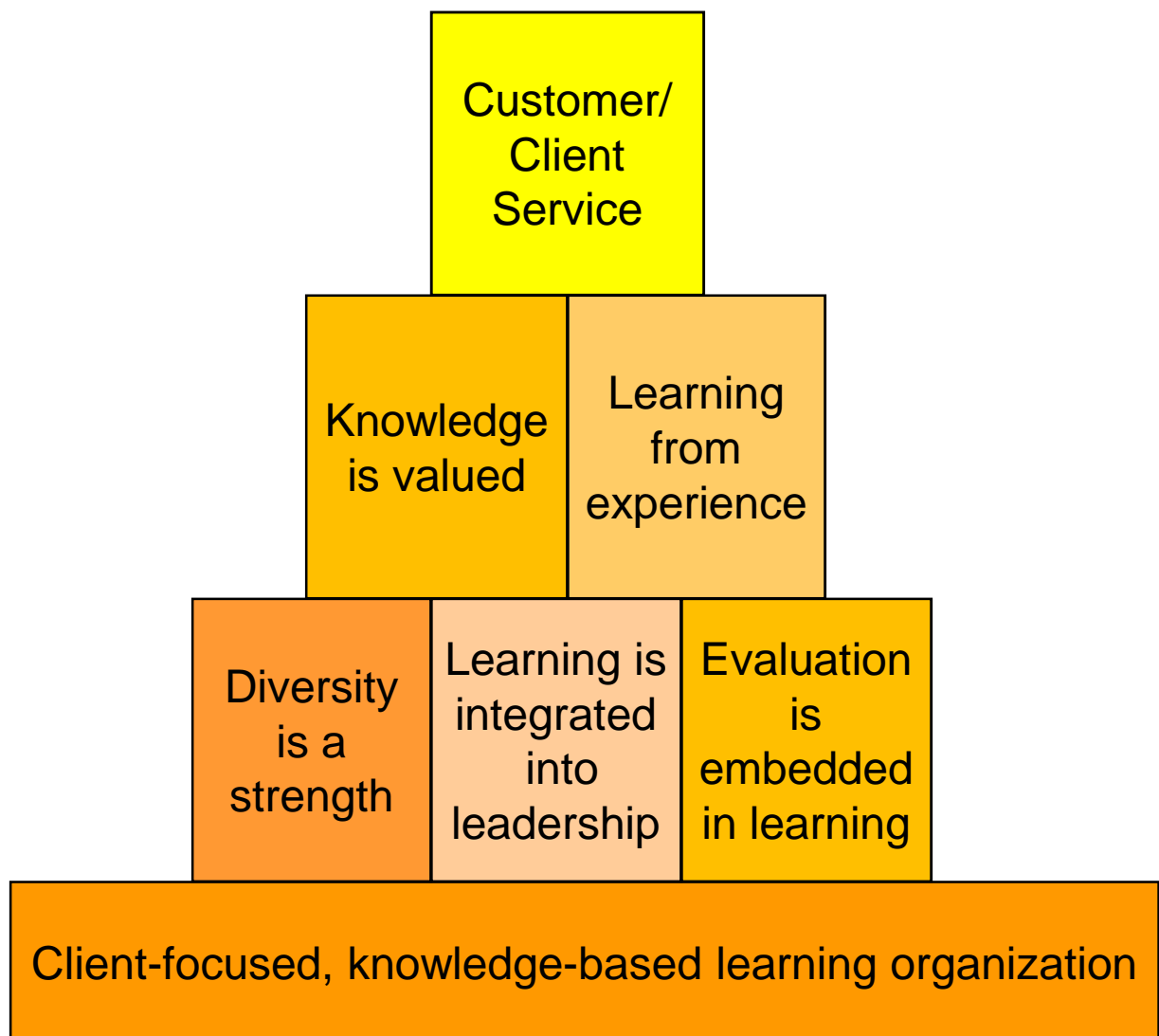
- partnerships with customers, suppliers, competitors, and community stakeholders
- research (laboratories, literature, and empirical studies)
- feedback from clients and suppliers
- work experiences of employees
- informal sharing (eg, Twitter, Facebook, LinkedIn, communities of practice)
- formal sharing (eg, conferences, team and group meetings)

Continuous learning, knowledge creation and knowledge transfer are the cornerstones of ANY organization's sustained future. Knowledge creation and transfer occur *through people* by using a variety of methods and learning processes, supported by information technology tools.

Leadership development forms the second ring in the diagram. Leaders are needed who will help create a knowledge-based learning organization, and who will put into place learning and knowledge creation processes. This presents, as a consequence, a big challenge for organizations to determine how to develop the much-needed leadership skills for the present and the future.

The result of these actions and activities, conducted in a coherent manner under an umbrella framework, is the real-world application of how knowledge is created, shared, multiplied and sustained over time.

# Guiding Principles for a Knowledge-Based Learning Organization



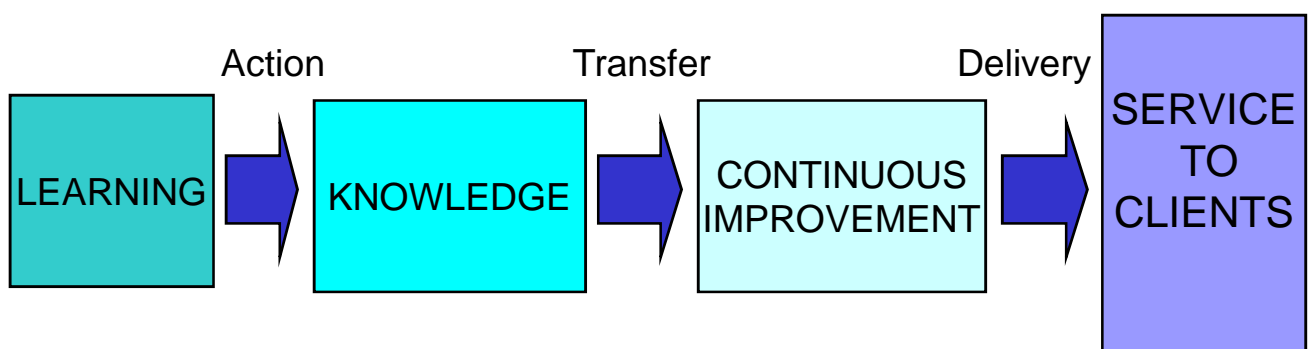
# Knowledge as a Strategic Asset

- This framework provides an enhanced capacity to learn at the individual, team, group and organizational levels, in turn encouraging *knowledge transfer* and *innovation* to support improved service to customers and clients
- It's the conduit to creating a *knowledge-based workforce* through the *recruitment* of talented people and the *retention* of skilled and competent employees
- *Collaborative learning* is key to this, and requires the creation and development of *learning relationships* across functions throughout an organization

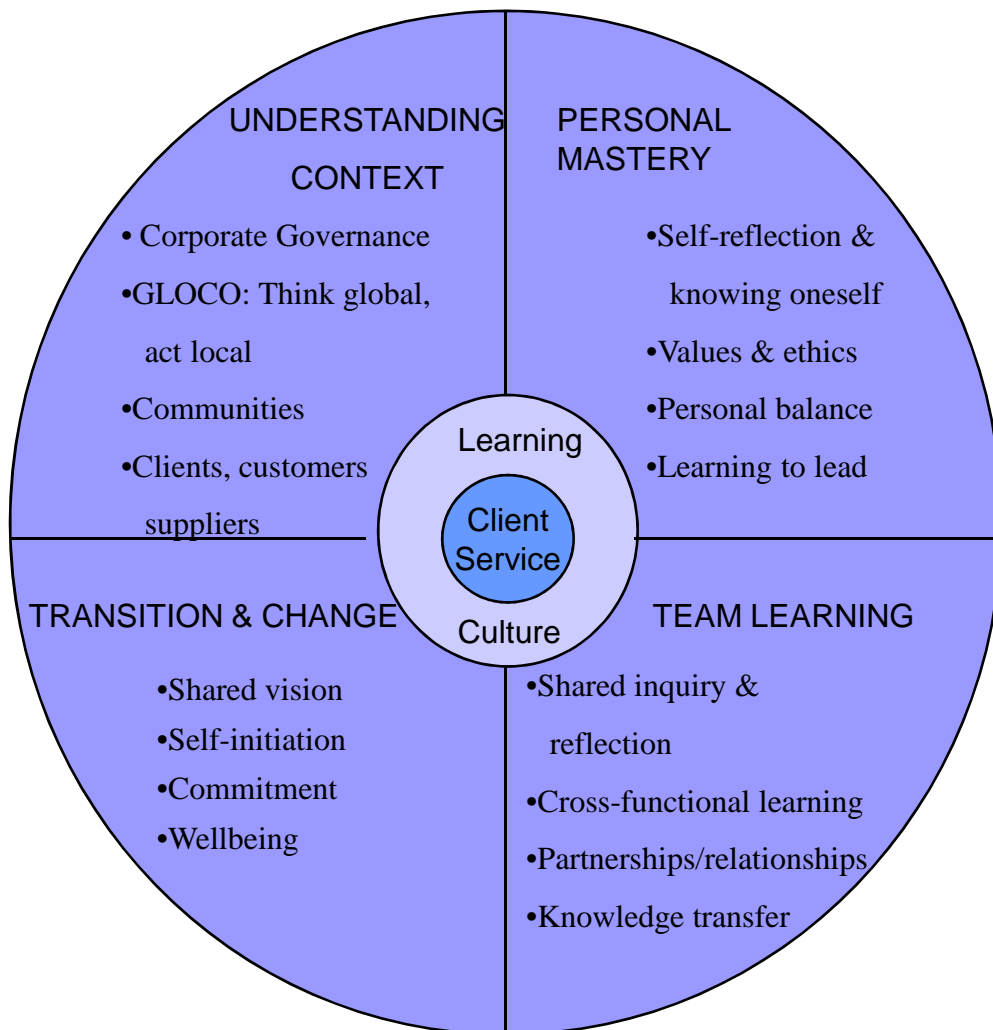
# From Learning to Client Service

It's not enough that employees engage in learning. They must also take *effective action* to apply what they learn to create and share new knowledge, and in turn spark continuous improvement in client service and those activities supporting it.

A continuous learning and knowledge framework is not intended to impose a structure. Rather, it's to *enable* the organization to *adapt* learning strategies and activities to its business needs and priorities.



# A Corporate Learning & Knowledge Framework



To bring clarity to the discussion on continuous learning and knowledge transfer, four content areas are presented in the above diagram. All corporate learning will typically fit under these areas, which will provide the needed clarity for managers staff because they integrate learning elements into one whole.

### **1) Understanding Context**

*Knowing one's role within the organization and where it fits in the broader picture in regard to serving clients, as well as in society.*

The concept of GLOCO is especially relevant here: understanding global forces and thinking of the interconnections, but acting locally when it comes to taking action to support the organization's mission.

### **2) Transition & Change**

*Creating one's personal vision of contribution to the organization's broader vision. A commitment to continuous learning to strengthen one's capacity to adapt to change. Contributing to workplace wellbeing through one's actions.*

This content area incorporates shared vision and the key leadership behavior of enrolling people. This contributes in turn to enhancing collective learning.

### **3) Team & Group Learning**

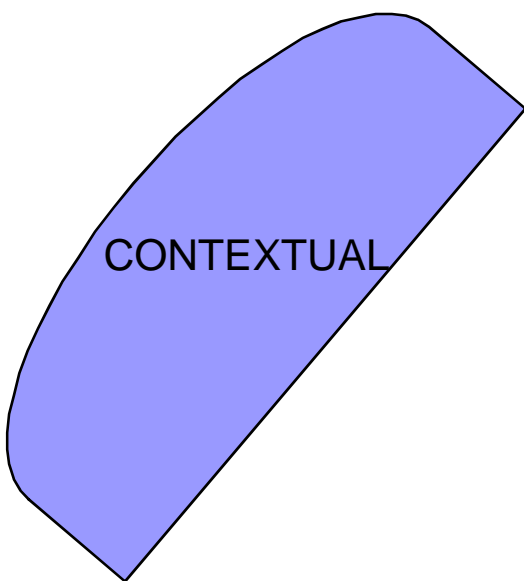
*Building strong inter-personal relationships, with a clear sense of purpose, shared vision and interdependency. Engaging in ongoing knowledge transfer, both within and across teams. Creating partnerships and alliances with across groups and teams within the organization and with stakeholders.*

### **4) Personal Mastery**

*Ongoing inquiry and reflection to enhance the understanding of oneself. Achieving clarity on one's personal values and ethics, and the degree of congruence with those of the organization. Learning to lead through knowing oneself. Maintaining a healthy balance between work and home.*

***What leaders are called upon to do in a chaotic world is to shape their organizations through concepts, not through elaborate rules or structures.*** (Margaret Wheatley)

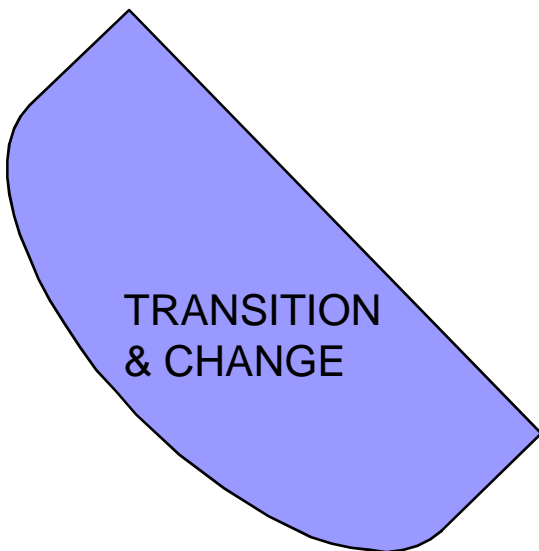
# Framework's Quadrants



GLOCO - Think  
global, act local

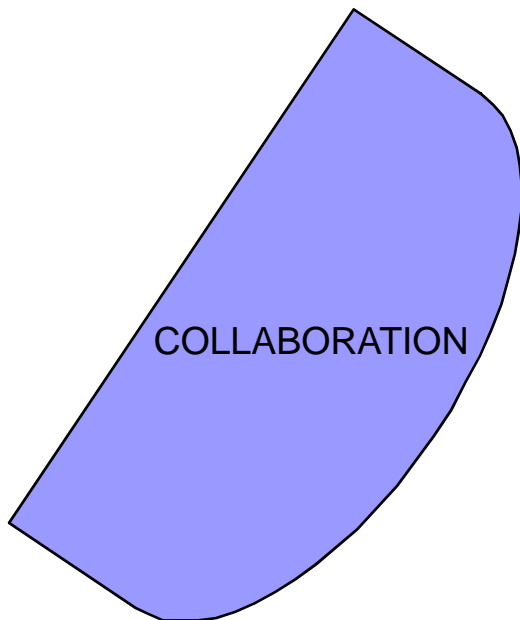
- Understanding interrelationships and patterns of change, within the organization and in the outside world
- Interpreting underlying forces and emerging trends
- Understanding one's role within the organization and where it fits in the broader picture
- Working effectively within the corporate governance structure
- Understanding the evolving needs of clients, customers and suppliers

# Framework's Quadants



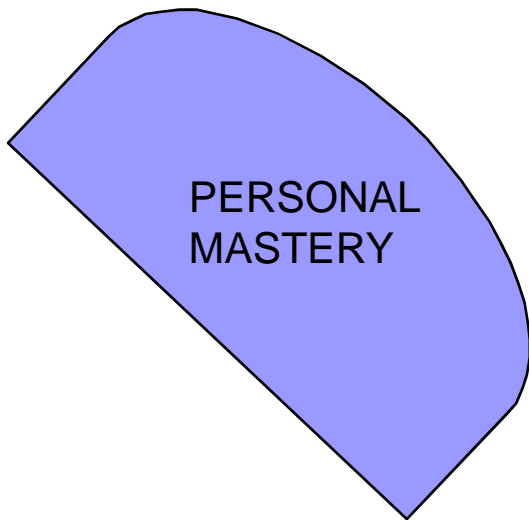
- Self-initiating to create one's future as an effective employee
- Creating one's personal vision within the context of the corporate vision
- Committing to continuous learning to strengthen one's capacity to adapt to change
- Contributing to workplace wellbeing through one's actions
- Learning how to see the real world more clearly, and the impact of outside changes on the organization

# Framework Quadrants



- Aligning and developing the capacity of the team through inquiry and reflection
- Building strong inter-personal relationships, with a clear sense of purpose, shared vision and interdependency of effort
- Engaging in ongoing knowledge transfer, both within and across teams
- Creating partnerships and alliances across groups and teams, including external stakeholders

# Framework Quadrants

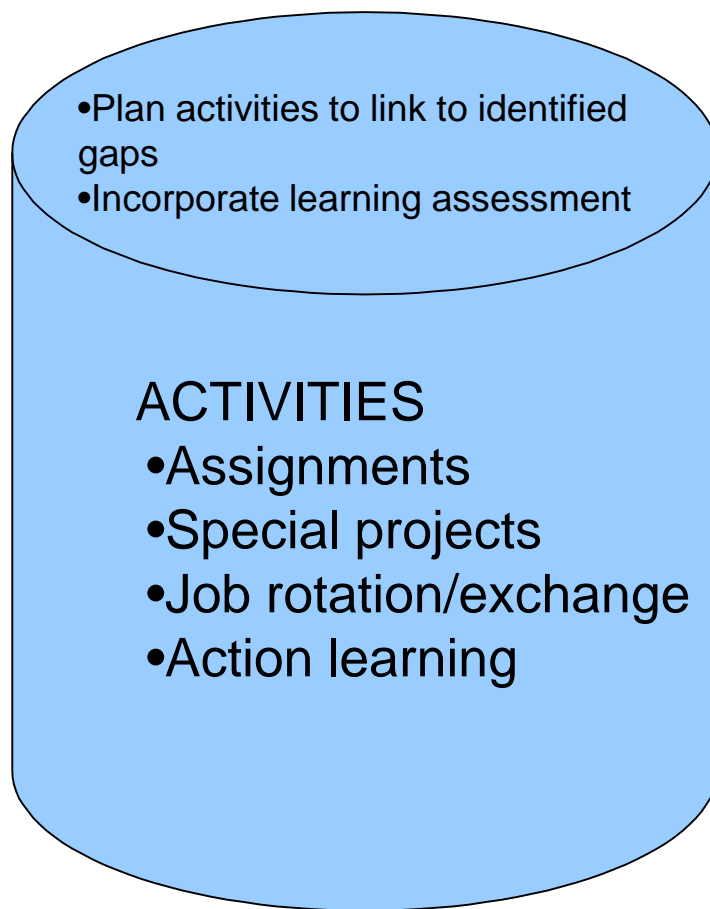


- Continuous quest for self-improvement and self-discovery
- Ongoing inquiry and reflection to enhance the understanding of oneself, thus facilitating personal growth
- Achieving clarity on one's personal values and ethics, and the degree of congruence with those of the organization
- Learning to lead through knowing oneself and available corporate support processes and tools
- Maintaining a healthy balance between work and home

# Framework Learning Strategies

- Three broad learning strategies underlie the framework:
  - 1) Experience-based learning
  - 2) Education-based learning
  - 3) Relationship and feedback-based learning
- From each strategy flows a variety of activities that addresses the learning styles of employees and that support the achievement of corporate business needs and priorities
- The following model depicts the three strategies in the context of the above learning framework

# Experience-Based Learning



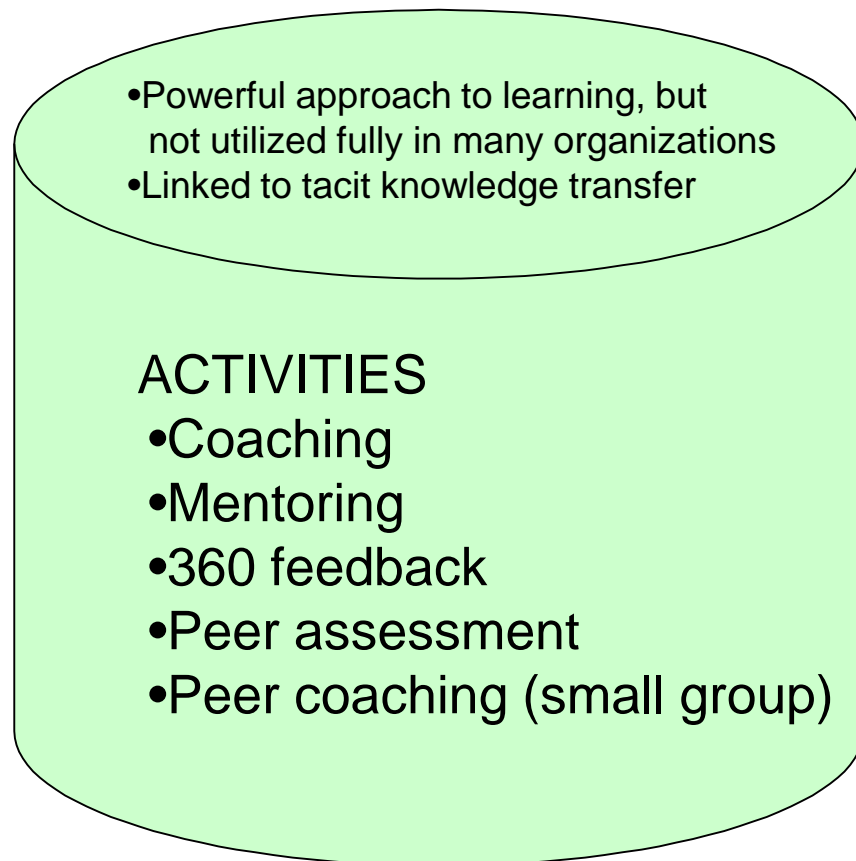
# Education-Based Learning

- Classroom is traditional corporate approach
- E-learning is emerging choice

## ACTIVITIES

- Classroom instruction
- E-learning
- Distance learning
- Workshops & conferences
- Reading & podcasts

# Relationship and Feedback Learning

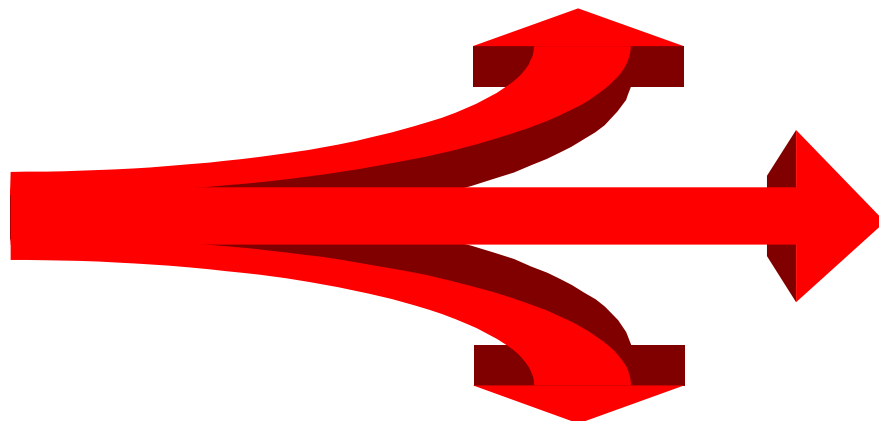


# Knowledge Creation & Transfer

*A knowledge strategy involves the transfer of knowledge and validation of knowledge among people to ensure you have the right culture, the right infrastructure. It's almost like you use knowledge as an embedded capability in the organization.*

Hubert Saint-Onge

(Founder, Saint Onge Alliance and  
former Senior VP, Strategic Capabilities, Clarica)



# Knowledge Creation & Transfer

- Essential component of any corporate skills and learning strategy
- Achieved through *relationships, information sharing* and *collaborative learning*
- Uses a variety of methods, and achieves *four key outcomes*:
  - 1) Accelerates *diffusion* of best practices and new knowledge across the organization
  - 2) Helps strengthen employees' understanding of the *context* in which the organization operates
  - 3) Facilitates organizational *transformation*
  - 4) Provides an enabling process of *personal contribution* to the organization, and in turn personal growth and development (*mastery*)

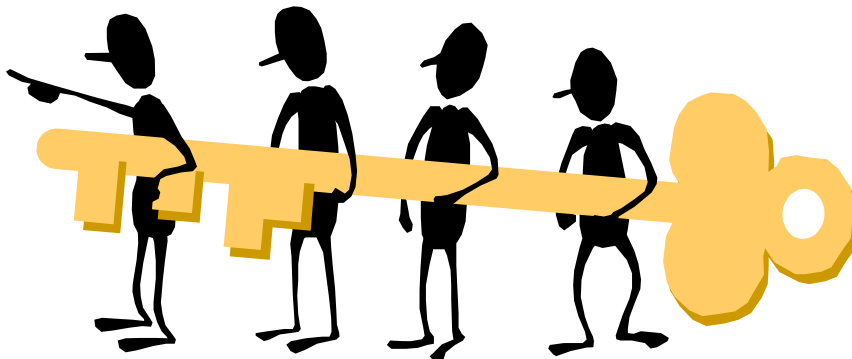


# Unlocking Knowledge

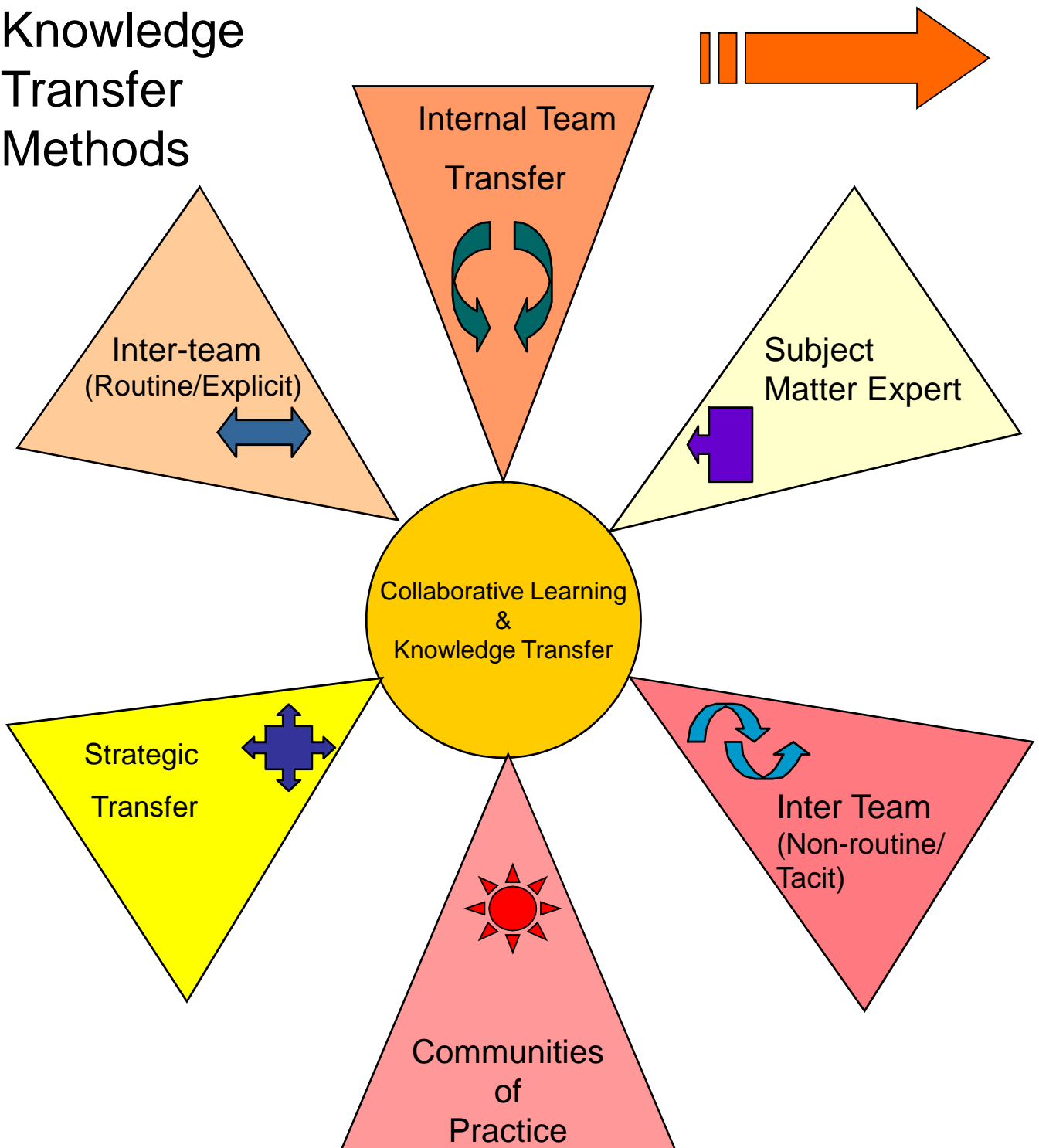
*An organization cannot be the owner of an employee's knowledge, which exists as an ever-changing web of relationships in that employee's head....managers need to know that using the skills that allow employees to share knowledge fully requires extended training and coaching.*

Nancy Dixon

(Author, *Common Knowledge*)



# Knowledge Transfer Methods

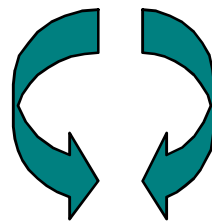


The methodology to learning at the level of the organization is achieved through knowledge transfer, which may be done via a variety of methods. The following six methods show a methodology to push learning from that of the individual to that of team and groups and on to the organization

# Knowledge Transfer Methods

## Internal Team Transfer

### *After Action Reviews*



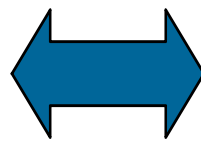
- Conducted after a project is completed (or sometimes during it)
- Focus is on retaining the knowledge *within the team/group*
- Team/group documents the discussion for future projects
- Members *speak openly*, without fear of recrimination
- Both *tacit* and *explicit* knowledge are captured
- AARs have a cumulative effect by building a documented knowledge base

AARs are a very effective way to consolidate learning at the end of a project or an event. This includes the use of pilots as a means to test and assess methodologies.

# Knowledge Transfer Methods

## Inter-Team Transfer

*Explicit/Routine Knowledge*



- Focus is on *transferring lessons* learned with other teams that are involved in similar work/projects
- Emphasis is on *explicit* knowledge; thus, it can be shared quickly
- Emphasis is on *routine* tasks, not those that are special or unique
- May be seen as the ‘best practice’ approach
- Recipients of the knowledge transfer must decide *how best to use it*
- Need for a *solid understanding of the interdependencies* of the business. This type of transfer is *not* done in a vacuum

This method holds great potential for organizations. In particular, it’s intended to address the rapid sharing of information, ideas, best practices, etc., and fits well within an environment of change and ambiguity.

# Knowledge Transfer Methods

## Inter-Team Transfer

*Tacit/Non-routine Knowledge*



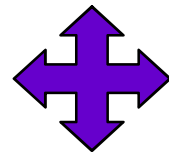
- Emphasis is on transferring *tacit* knowledge to teams involved in different work
- Takes *more time* because dealing with tacit knowledge, and also because there may be a 'translation' element (ie, vocabulary)
- *Customization* of the incoming knowledge may produce lag effects
- Strength of this method is that *tacit* knowledge is where organizations have their *comparative advantage*

This form of inter-team transfer is becoming increasingly important in a world characterized by ambiguity and subjectiveness. The huge amounts of tacit (contextual) knowledge that is resident in the heads of Baby Boomer employees needs to be accessed, captured and transferred to the organization PRIOR to their retirement. Losing this tacit knowledge will undermine an organization's capacity to effectively meet its mission.

# Knowledge Transfer Methods

- Team to Organization Transfer

  - *Strategic Projects*



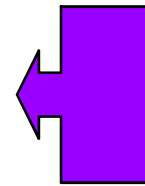


  - Focus is on projects and initiatives that are unique and that *affect the entire organization*
  - Incorporates both *tacit* and *explicit* knowledge
  - Transfer is done in *real-time* mode, where possible, to address speed of change and organization's position in external environment
  - One way to facilitate the transfer of knowledge to the organization is through *Learning Histories* (narrative documents of an event or project in an organization)

Many organizations have a broad array of strategic initiatives underway. But they're not connected, nor to a common purpose. The rapidity of global change flow necessitates that a more integrated approach be taken to how information and the results of team efforts be shared and easily accessed by everyone in an organization.

# Knowledge Transfer Methods

## Subject Matter Expert Transfer

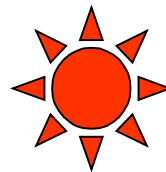


- *Most common form* of knowledge transfer in organizations
- Focus is on *explicit knowledge*, especially technical knowledge
- Both *routine* and *infrequent* tasks
- *Requested* by users, i.e., 'pulled' knowledge
- Requires organized approach to how information is compiled and made accessible to users

This form is especially tailored to specific areas that involve a high degree of technical expertise. One particular challenge is organizing the information from highly technical areas into databases that can be easily accessed and maintained.

# Knowledge Transfer Methods

## Communities of Practice



- Form the base of an organization's *ability to learn*
- Develop around *issues that matter* to people
- *Self-organizing* approach
- *Work across* business units, and across organizations.
- *Virtual* and *face-to-face*.
- Different from teams: CoPs are kept together through *shared learning* and *mutual interest*.
- *Not networks* - CoPs produce a shared practice as members engage in process of collaborative learning

Offer great potential in terms of engaging employees to share openly, collaborate and create new ideas that support service to clients. Because CoPs connect people across functions and business lines they help them to see the whole picture more clearly. Of strong note is the minimal amount of monies required by CoPs. They are self-initiating, but do require management's support and encouragement (e.g., allowing people to convene to meet face-to-face).

# Applying the Framework

## The Role of Leadership

An organization's management is instrumental in creating a robust knowledge and learning culture. Managers, as leaders, must:

- 1) *Provide purpose* to facilitate action
- 2) *Engage* employees to create a learning environment
- 3) *Build alliances* consisting of strong relationships
- 4) *Take responsibility* to foster the ownership of results
- 5) *Lead by example* to model core values and build commitment
- 6) *Serve clients and customers* through excellence in service delivery

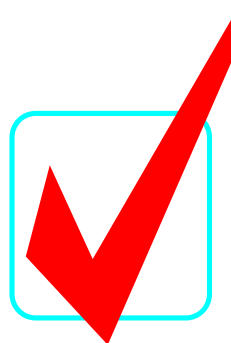
The six actions noted above are key competencies for an organization's leadership profile. By practicing these competencies, an organization's managerial leadership will help effect the necessary behavioral changes to help transform its corporate culture to one that embraces continuous learning and knowledge creation and transfer.

*Managers can facilitate the building of relationships that will lead to more and more effective knowledge sharing.*

Nancy Dixon

# Success Factors

- Senior management commitment, modeling of behaviors, and recognition of managers and employees who practice this
- Cross-functional information sharing emerges
- Self-organizing learning networks are encouraged and supported
- Active experimentation is part of learning (e.g. pilots)
- Supporting structure exists, but one that doesn't suppress creativity and innovation
- Recognition that people create knowledge; technology is an enabler
- Individual and group/team reflection and inquiry are valued and encouraged



# About the Author

Jim Taggart has worked for the federal government for 28 years, during which time his career has spanned labour market analysis, innovation policy and competitiveness, knowledge management and leadership development. He has been a student of leadership for over 15 years, and devoted over a decade to applied work in leadership development, organizational learning and team building.

As a recognized thought leader Jim has participated in, including initiating and leading, many change management projects that dealt with downsizing, restructuring and departmental mergers. His work as Regional Economist involved leading a team responsible for labour market forecasting and the creation of knowledge products on occupational trends.

In addition to a B.A. and an M.A. (Honours) in economics from the University of New Brunswick, he holds an M.A. (Honours) in leadership and organizational learning from Royal Roads University. His Master's thesis was on the topic of shared leadership and entitled *A Leap of Faith*. Jim's passion for continuous learning and sharing with others extends to his belief that leadership resides at all levels of organizations and communities.

His blog <http://ChangingWinds.wordpress.com> examines leadership and political issues, and his website <http://www.LeadershipWorldConnect.com> is recognized as a source of comprehensive information on leadership and team learning.

Jim is an active member of Toastmasters International and currently president of his club. In his spare time he plays the piano and writes jazz piano music. He also enjoys reading books on business economics, political leadership and geo-politics, and an occasional espionage thriller. An avid mountain biker, he enjoys going for walks in the woods with his Labrador Retriever, Max.

Jim and his wife, Sue, have four adult children (three daughters and one son) and two granddaughters. They live in Ottawa, Canada.

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