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# A Blueprint for Learning & Knowledge Creation

*Staying Ahead of Your Competitors  
in a Turbulent World*

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**The ability to perceive or think differently is more important than the knowledge gained**

David Bohm  
(American physicist)

## Introduction

The underpinning of a corporate learning and knowledge blueprint is the relationship between an organization's goals and priorities and its people, those responsible for achieving results. This is carried out within its culture (the values and beliefs that drive behavior and performance), in which business processes, client service and employee learning are integral parts.

This blueprint outlines an integrated approach to continuous learning, knowledge creation and transfer. It needs to be emphasized that knowledge creation and transfer are not one in the same. It's one thing to foster knowledge creation through learning and experimentation; it becomes even more of a challenge to create the workplace environment, processes and systems to capture, codify and transfer knowledge.

In that context, the blueprint has been developed for a rapidly changing, volatile and unpredictable global environment. It provides a framework for enhancing personal and team learning, transition and change, and understanding the context in which people work and collaborate as they carry out their organization's mission. As such, it includes methods on how to put into practice knowledge creation and transfer. One vital point needs to be reinforced: Learning is not an end in itself; it must be connected to something meaningful, whether it is client service, research and development, manufacturing or public policy.

The intention of a learning and knowledge blueprint is not to impose a structure but rather to *enable* an organization to adapt strategies and activities to its business needs and priorities. This may be depicted as:



The blueprint encompasses four cornerstones: *people, processes, roles* and *leadership*. These cornerstones are inter-related, and together focus on achieving the organization's goals and priorities.

The essential elements of a learning and knowledge blueprint (the four cornerstones) need to be grounded. This is where a set of 10 principles is essential, serving in effect as a compass to the organization, and which is especially vital during periods of significant change and disruption.

Four major content areas flow from the four cornerstones and 10 principles. These four areas comprise learning approaches aimed at moving the organization forward towards its goals. The leadership challenge, therefore, is to keep the organization focused and adaptable as it's struck by change events. This is an inherent part of an organization's ongoing "learning."

## Transformative Learning and Change

The uncertainties and volatilities that have become characteristic of the global economy, with their impacts on organizations, are exerting growing pressures on how people learn, collaborate and create new knowledge as they strive to carry out their roles and responsibilities.

Although not a new theory, [Jack Mezirow's](#) work over several decades provides a valuable construct with which to approach how people learn in a changing environment. Of significant importance is Mezirow's observation that it's very difficult for people to make a transformative change if their new learning is done within their existing set of assumptions (values and beliefs). [Chris Argyris'](#) work on [mental models](#) and his [Ladder of Inference](#) is very relevant to the issue of transformative learning and how people attempt to reposition how they perceive the world and function within their workplace and communities. (His landmark HBR article [Teaching Smart People How to Learn](#) is pertinent to organizations seeking to transform their approaches to learning.)

In looking at the challenges that organizations face when it comes to rethinking how employees learn, create knowledge and adapt to change, Mezirow's personal transformation process is very useful as a basis for discussion and exploration. His process comprises 10 phases. As an individual, you:

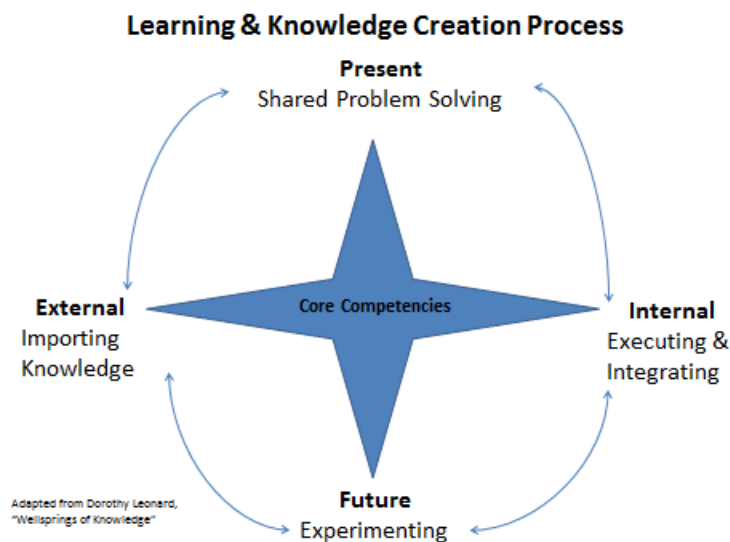
1. Experience a significant problem,
2. Carry out a self-examination,
3. Conduct a critical self-assessment of your assumptions (mental models), followed by a sense of detachment from your traditional expectations,
4. Compare your "discontent" to that of others, realizing they also share this feeling,
5. Explore options for new behaviours,
6. Build competence and confidence in new roles,
7. Plan a course of action,
8. Acquire knowledge and skills to execute your new plan,
9. Take on new roles and invite feedback,
10. Reintegrate into your environment, following your newly established perspective.

(Source: Patricia Cranton, *Understanding and Promoting Transformative Learning*)

[Patricia Cranton](#) explains transformative learning in the context of change in the world around us and how each of us responds and adapts:

*We interpret our experiences and the things we encounter in our own way; what we make of the world is a result of our perceptions of our experiences. Transformative learning, then, is a process of examining, questioning, validating, and revising these perceptions....They include distortions, prejudices, stereotypes, social context, and lack of knowledge....Learning occurs when an individual enters a process of reconciling newly communicated ideas with the presuppositions of prior learning.*

The following diagram illustrates a learning and knowledge creation process in the context of changing internal and external environments.



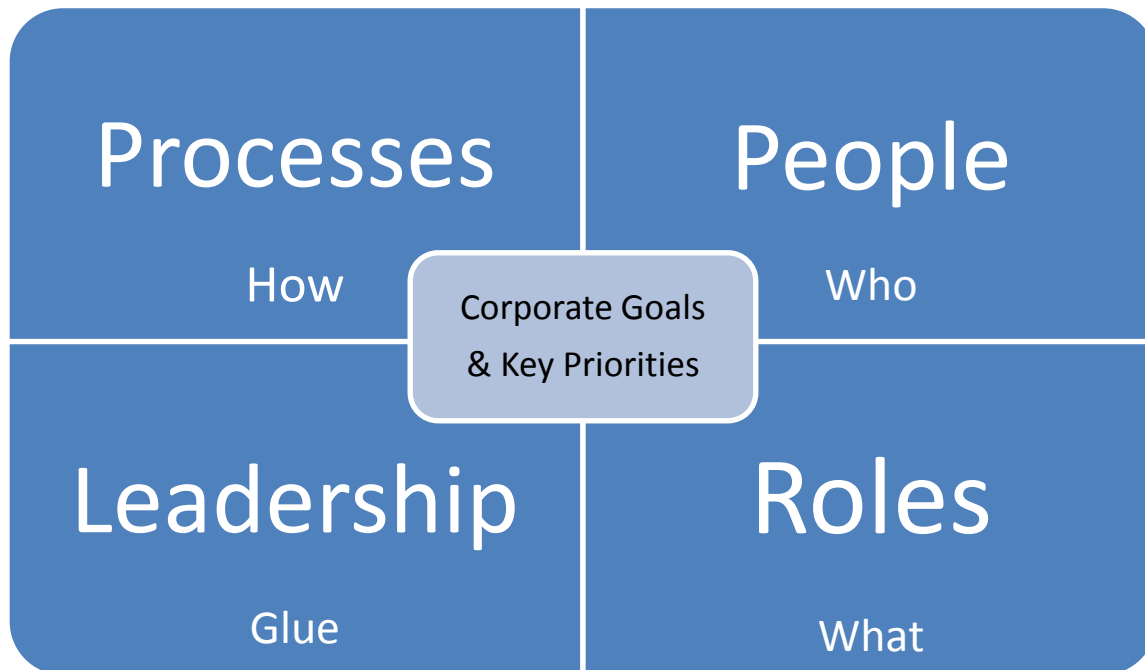
At the heart of the process are the organization's core competencies. Identifying these is a crucial role for management. These competencies work in a two-way flow with the shared problem-solving that employees undertake on a daily basis. The results from problem-solving feed into the organization's processes and client service, from which experimentation is conducted to produce new innovations in products or services, which flow back to integrating into the operational environment.

New knowledge flows in two directions, from the organization outwards (e.g., to clients and stakeholders), and also from the outside world into the organization. Knowledge is incorporated into the organization's daily problem-solving activities, enhancing its capacity and core competencies. And the cycle continues.

However, to achieve this state of being it is essential to have a clearly established foundation on which learning and knowledge creation are based. The next section presents this foundation.

## The Four Cornerstones

The learning and knowledge creation process depicted above requires a firm foundation if it is to be successful in contributing to reaching the organization's goals and priorities. Such a foundation is composed of four major cornerstones. While each cornerstone plays a unique role in a learning and knowledge strategy, it's important to recognize their interdependency if organizational performance is to be realized.



**People** – WHO carry out the work.

**Processes** – HOW the work gets done to achieve results and goals.

**Roles** – WHAT are employees' responsibilities as part of executing the processes.

**Leadership** – GLUE that brings and keeps people together to focus on shared results and goals.

To maintain focus, a learning and knowledge strategy (including its policies and procedures) needs a set of clearly defined principles. These are essential to keeping the strategy aligned with the organization's needs, and serve as a compass during times of significant change or disruption.

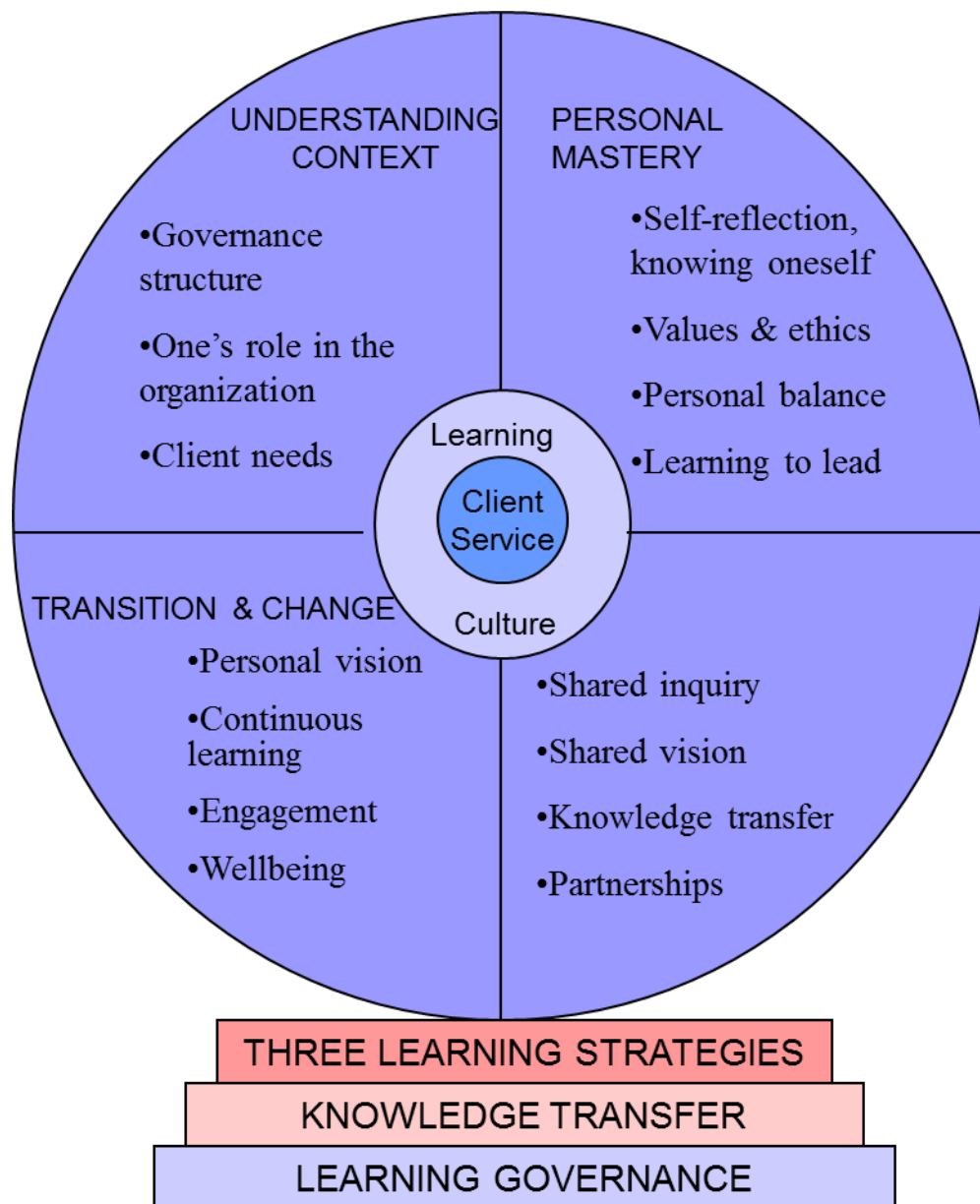
## Learning Principles

- 1) A learning strategy is set within the organization's culture: values, beliefs, aspirations.
- 2) Corporate goals and priorities drive learning; a learning and knowledge strategy is therefore aligned with these goals and priorities.
- 3) Continuous learning is viewed as a business investment, interwoven with organizational performance, innovation, client service and leadership.
- 4) Learning tools and processes are enablers to creating knowledge, where informal and formal learning are valued.
- 5) Learning is a reciprocal endeavour between the employer and the employee: the former provides opportunities for learning and development; the latter assumes responsibility for his or her learning journey.
- 6) Management embraces a learning culture by modeling learning behaviours.
- 7) Best-Practices in learning and knowledge creation are recognized, documented and shared throughout the organization.
- 8) A learning strategy must be adaptable to both internal and external events and their impacts on the organization.
- 9) Learning becomes a *way of being* and not an administrative procedure.
- 10) Service to clients and customers is the basis for learning and knowledge creation processes and policies.

## Learning & Knowledge Content Areas

To bring coherence and focus to embedding learning and knowledge creation as a *way of being* within the organization (with reference to the above learning and knowledge creation diagram), four content learning areas are identified. All learning and knowledge creation fits within these four areas, as shown in the following diagram. The content areas provide clarity for managers and employees because they integrate learning elements into one whole picture.

### Learning & Knowledge Content



## 1) Understanding Context

- Understanding one's role in the organization.
- Working effectively within the organization's governance structure.
- Recognizing the evolving needs of clients.

Understanding context is about *Thinking Global, Acting Local*. It encompasses recognizing interrelationships and patterns of change, and how underlying forces and emerging trends may affect one's role within the organization. This requires being clear on one's role and the ability to work effectively within the organization's governance structure. And it demands an acute understanding of the evolving needs of clients.

## 2) Transition & Change

- Creating one's personal vision of contribution.
- Embracing continuous learning.
- Contributing to workplace wellbeing.
- Engaging co-workers in collaborative work.

This involves self-initiating to create one's future as an employee, based on a personal vision of contribution to the organization. Understanding where one's vision fits within the larger organizational vision, combined with a commitment to continuous learning, facilitates performance and change adaptability.

## 3) Team Learning

- Participating in collective inquiry and reflection to foster creativity and innovation.
- Building strong inter-personal relationships, with a clear sense of purpose, shared vision.
- Engaging in ongoing knowledge transfer, both within and across teams.
- Creating partnerships and alliances with groups and teams within the organization and outside.

This encompasses several critical aspects. It begins with aligning and developing the capacity of the team through shared inquiry and reflection. Building strong inter-personal relationships, characterized by a clear sense of purpose, shared vision and interdependency of effort underscore the foundation of strong teamwork. In addition, it means engaging in ongoing knowledge transfer, both within and across teams, and creating partnerships and alliances with groups and teams in the organization and with diverse stakeholders.

## 4) Personal Mastery

- Ongoing inquiry and reflection to enhance the understanding of oneself.
- Achieving clarity on one's personal values and ethics.
- Learning to lead through knowing oneself.

- Maintaining a healthy balance between work and home.

Personal Mastery represents the continuous quest for self-improvement and self-discovery. At its core is inquiry and reflection, a never-ending process of knowing oneself. This facilitates personal growth. It is augmented by achieving clarity of one's personal values and ethics, and the degree of congruence with those of the organization. Learning to lead through knowing oneself is essential to contributing to the organization's collective growth because of the importance of building leaders throughout. Finally, maintaining a healthy balance between work and home supports the sustainability of Personal Mastery.

## Three Learning Strategies

Three broad learning strategies underlie this blueprint:

- 1) *Experience-based learning*
- 2) *Education-based learning*
- 3) *Relationship and feedback-based learning*

From each strategy flows a variety of activities that address the learning styles of employees and that support achieving business needs and priorities

The following depicts the three strategies in the context of the blueprint, competencies and learning capacity.

### 1) Experience-Based Learning

Experience-based learning activities encompass:

- Assignments
- Special projects
- Job rotation and role exchange
- Action learning

In planning these activities, it's necessary to link to the gaps identified through learning assessments.

## 2) Education-Based Learning

This form of learning is rapidly evolving as a result of technology, combined with the different learning styles of Generation Y. Traditional activities, including those in the past 15 years, comprise:

- Classroom instruction
- E-learning and distance learning
- Workshops and conferences
- Reading and videos

However, the newest forms of learning involve social media and in particular webinars and podcasts. The two latter methods are especially powerful because of their capacity for storage for later access (i.e., learning at the learner's convenience) and extremely low cost.

## 3) Relationship-Feedback Learning

This approach to learning is critical because of the face-to-face dimension. It deepens the learning acquired through education-based learning, spanning such as activities as:

- Coaching
- Mentoring
- 360 feedback
- Peer assessment
- Peer coaching (small group)
- Action learning

Relationship-feedback learning is a powerful approach to learning; however, it is not adequately utilized by most organizations. This form of learning is especially relevant and linked to tacit knowledge transfer (sharing and documenting knowledge that resides in people's heads).

## Knowledge Creation & Transfer Methods

Although not traditionally recognized, an essential component of a learning strategy is knowledge creation and transfer. This is the DNA of any organization, at its core how it fosters creativity and innovation as it strives to meet and exceed the wants and needs of its clients.

Continuously creating new knowledge and transferring it throughout the organization is achieved through three vital daily processes: *relationships*, *information sharing* and *collaborative learning*.

Knowledge creation and transfer use a variety of methods, aiming towards four key outcomes:

- 1) Accelerates *diffusion* of best practices and new knowledge across the organization,
- 2) Strengthens 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.

### 1) Internal Team Transfer: After Action Reviews

- Well-known method of achieving a high level of leveraging knowledge within a team.
- Based on the highly successful experiences of the U.S. Army (*After Action Reviews*).
- Conducted after a project or event is completed (but may also be held during certain stages of a project).
- May do virtually, as well as face-to-face.
- Focus is on retaining the knowledge *within the team*.
- Short and to the point (e.g., half an hour or less, or one to two hours).
- During an AAR, a team member facilitates and members take personal notes.
- Team also documents the discussion for future projects.
- Members speak openly, without fear of recrimination.
- Both tacit and explicit knowledge are captured.
- AAR discussion addresses:
  - a) What were the objectives of the project?
  - b) What took place? (were the objectives reached?)
  - c) Why did this happen? (eventual outcomes)
- Over time, AARs have a cumulative effect by building a documented knowledge base.
- Although the information captured during an AAR is retained within the team, there are occasions when it may be shared with other teams or transferred to a corporate knowledge database (e.g., intranet site).

## 2) Inter-Team Transfer: Explicit/Routine Knowledge

- Focus is on transferring lessons learned with other teams that are involved in similar work (i.e., linked to business results).
- Emphasis is on *explicit* knowledge; therefore, it can be shared quickly with minimum effort.
- In addition, emphasis is on *routine* tasks, not those that are special or unique.
- Virtual transfer is increasingly important form (e.g., web-streaming, webinars, intranets).
- May be seen as a “best practice” approach; however, care needs to be taken if positioned as such (some argue there’s no such thing as best practices).
- Recipients of the knowledge transfer must decide how best to use it (what’s important and what’s not to their work) and how to share it with others.
- Big implications for how an organization’s intranet is set up, if this is the primary knowledge dissemination vehicle. Danger of databases being too generic, thus making access to specific information difficult.
- Need for a solid understanding of the interdependencies of the business. This type of transfer is *not* done in a vacuum.

## 3) Inter-Team Transfer: Tacit/Non-routine Knowledge

- Emphasis is on transferring *tacit* knowledge to teams involved in different work.
- Requirement to determine how to best transfer this knowledge, since there’s a translation element (e.g., vocabulary, context/culture, business objectives).
- More time consuming to capture and share than explicit knowledge.
- Lag effect consequences in how long it takes recipient team(s) to receive the knowledge in a form it (they) can use, i.e., customization of the incoming knowledge.
- Because this deals with tacit knowledge, *people-to-people transfer* is the best avenue. Therefore need to determine value-added role of IT.
- Transfer of tacit knowledge is not only the most difficult, in contrast to explicit knowledge, but also where organizations gain their strategic advantage and long-term survival.

## 4) 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.
- Difficult to transfer into corporate intranet databases because of the unique knowledge involved, and of which much is tacit.
- Transfer is done in real-time mode, where possible, to address speed of change and an organization’s position in external environment.
- U.S. Army has its *Center for Army Lessons Learned*. Senior leadership determines focus of knowledge needed for the future, gaps and opportunities. Four step process:
  - a) Identify learning opportunities
  - b) Observe and collect knowledge

- c) Create knowledge products
  - d) Deploy expertise
- MIT pioneered use of *Learning Histories*, which are narrative documents of an event or project in an organization. Incorporates both knowledge transfer from a project/event and the processes used to gather information.

## 5) 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: “pulled’ knowledge.”
- Virtual aspect is escalating, e.g., webcasting, webinars, e-learning, intranet web sites.
- Compatible technology is essential for effective use. Becomes a barrier when incompatibility arises.
- Requires organized approach to how information is compiled and made accessible to users.

## 6) Communities of Practice (CoPs)

- A *voluntary* group of peers or practitioners whose members share and learn together to improve their personal performance.
- Develop around *issues that matter* to people.
- A key part of an organization’s *ability to learn*.
- *Non-hierarchical* and *self-organizing*, requiring management’s support and leadership. A *charter* helps set the Cop’s rules and practices.
- *Work across* business units, connecting people across functions and business lines, and also 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 engaging employees to share openly, collaborate and create new ideas with the aim of helping the organization achieve its mission

## Success Factors for Learning and Knowledge Creation

- Management demonstrates its commitment by modeling learning behaviors.
- Managers and employees who embrace continuous learning and knowledge creation are recognized by management.
- Cross-functional information sharing is accepted as the way how business is done.
- Self-organizing learning networks are encouraged and supported.
- Active experimentation is part of learning.
- Creativity and innovation are encouraged.
- Recognition that people create knowledge; technology is an enabler.
- Individual and team reflection and inquiry are valued and encouraged.



*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*)

# Resources

## Leadership & Learning Blogs–Websites

Bret L. Simmons: Positive Organizational Behavior

<http://www.bretsimmons.com/>

Bret's regular blog posts cover a wide range of topics on leadership issues. Ranked as one of the top leadership blogs in the U.S.

Business Exchange: Management Ideas

<http://bx.businessweek.com/management-ideas/reference/>

A terrific source for information on business and management-related issues.

Capture Your Flag: Interviewing Tomorrow's Leaders...Today

<http://www.captureyourflag.com/>

An eclectic array of interviews with leaders from around the world.

Center for Creative Leadership

<http://www.ccl.org/leadership/index.aspx>

Look under the Research & Faculty tab for free papers and reports.

Changing Winds

<http://changingwinds.wordpress.com/>

Author's website-blog: Broad selection of articles on leadership, teams, learning.

Great Leadership

<http://www.greatleadershipbydan.com/>

Dan McCarthy both writes on and hosts Leadership Blog Carnival

HR World: The Top 100 Management and Leadership Blogs

<http://www.hrworld.com/features/top-100-management-blogs-061008/index.php>

Organized around diverse themes relating to organizational issues.

Infed.org: Leadership Models

<http://www.infed.org/leadership/>

Includes a variety of excellent essays on shared leadership and learning.

Integral Coaching Canada

<http://www.integralcoachingcanada.com/home.php>

Contains excellent articles on coaching (look under the Resources tab).

International Leadership Association

<http://www.ila-net.org/>

If you're looking to join an excellent network with supportive people, this is it.

Managing Leadership: The Strategic Role of the Senior Executive

<http://managingleadership.com/>

Excellent blog posts on corporate leadership issues, including book reviews.

Paracomm Partners International: Coaching

<http://www.paracomm.com/index.html>

Provides excellent articles on coaching.

Society for Organizational Learning

<http://www.solonline.org/>

Founded by Peter Senge. Look under the Publications tab, then click the Library link for free articles.

The Cranky Middle Manager

<http://www.crankymiddlemanager.com/home>

Wayne Turmel shares his insights on middle management (includes podcasts)

## Videos

### LEADERSHIP & LEARNING:

Ray Anderson: Interview on Sustainability and Leadership

<http://www.youtube.com/watch?v=4EsfYUKd7SQ&feature=fvst>

Lee Bolman: *"Reframing Organizations"*

<http://www.youtube.com/watch?v=tQDJfYPG5Ho>

Stephen Covey: *"On Choosing Success"*

<http://www.youtube.com/watch?v=U8LM4C1I70U>

*"Five Emotional Cancers"*

<http://www.youtube.com/watch?v=f4uuZYAdbes>

John Kotter: *"The Importance of Urgency"*

[http://www.youtube.com/watch?v=zD8xKv2ur\\_s](http://www.youtube.com/watch?v=zD8xKv2ur_s)

James Kouzes and Barry Posner: “*Truth About Leadership*”  
[http://www.youtube.com/watch?v=yiAtoO61C\\_w](http://www.youtube.com/watch?v=yiAtoO61C_w)

Henry Mintzberg: An interview on his book *Managing*  
<http://www.youtube.com/watch?v=TVBPhCJh-dw>

Peter Block on “The Structure of Belonging”  
Part 1: <http://www.youtube.com/watch?v=CwahGcEiAr0>  
Part 2: <http://www.youtube.com/watch?v=MTpSLKr7xao>  
Part 3: <http://www.youtube.com/watch?v=Z7rGEgZpQil>

Peter Drucker “An Interview”  
<http://www.youtube.com/watch?v=DbM7gU6Y5LA>

Peter Senge and Jon Kabat on “The Business of Changing the World”  
<http://www.youtube.com/watch?v=27jEzce0q2Q>

Margaret Wheatley, Excerpt from “Eight Fearless Questions”  
<http://www.youtube.com/watch?v=PvJeqA9SnpU>

## **SOCIAL MEDIA:**

Chris Brogan “The Serendipity Engine”  
<http://www.youtube.com/watch?v=XIRD5oosqIU>

Gary Vaynerchuk “Building Personal Brand (and Passion) within Social Media”  
<http://www.youtube.com/watch?v=EhqZORU95d4>

Jonathan Fields “Conversations at the Crossroads of Work, Play, Entrepreneurship & Life”  
<http://www.jonathanfields.com/blog/>

Mitch Joel (Canada’s leading social media thinker)  
<http://www.twistimage.com/about-mitch/>

Zen and the Art of Life Management (interview with three well-known bloggers)  
<http://www.youtube.com/watch?v=JD-BdoKqFfk>

Seth Godin (shares his insights on organizations)  
[http://www.youtube.com/watch?v=mO-3\\_pYEQXU&feature=feedrec\\_grec\\_index](http://www.youtube.com/watch?v=mO-3_pYEQXU&feature=feedrec_grec_index)

## Social Media and Networking Books

The following books are from well-respected writers and thinkers on social media and its impacts on the workplace and society.

*Enchantment* (Guy Kawasaki)

<http://www.kirkusreviews.com/book-reviews/non-fiction/guy-kawasaki/enchantment-kawasaki/>

*Linchpin* (Seth Godin)

<http://www.amazon.ca/Linchpin-Seth-Godin/dp/1591843162>

*Crush It* (Gary Vaynerchuk)

<http://crushitbook.com/>

*Multipliers* (Liz Wiseman)

<http://www.harpercollins.com/books/Multipliers/?isbn=9780061999482>

*The Thank You Economy* (Gary Vaynerchuk)

<http://garyvaynerchuk.com/post/226157962>

*The New Community Rules* (Tamar Weinberg)

<http://www.newcommunityrules.com/>

*Six Pixels of Separation* (Mitch Joel)

<http://www.twistimage.com/book/>

*The Whuffie Factor* (Tara Hunt)

<http://www.horsepigcow.com/book-the-whuffie-factor/>

*Trust Agents* (Chris Brogan)

<http://www.chrisbrogan.com/where-to-buy-trust-agents/>

## About the Author



Jim Taggart is a leadership and organizational learning consultant. He worked for three decades with the Government of Canada. His career spanned labor market forecasting and analysis, innovation and competitiveness policy development, and leadership development and organizational learning project management.

A recognized thought leader, Jim maintains a website and blog on leadership and management issues. He holds a Master's degree in economics from the University of New Brunswick and a Masters degree in Leadership and Organizational Learning from Royal Roads University.

Visit his leadership website: <http://changingwinds.wordpress.com/>

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