

towards social knowledge

what social knowledge is and how it leverages the power of community-generated
and community-maintained knowledge

published october 2013



Executive Summary

We are in the middle of the largest transformation organizations have undertaken in memory; every single process, function and role is going to be changed.

While business continues to be about entities designing, building, marketing, selling, and servicing their products, how they do it is different. We no longer have the luxury of addressing these functions independently; digital transformation paired with social evolution means each interaction is a complete customer lifecycle and must contain the necessary knowledge and content to fulfill the needs of the company and the customer.

Content and knowledge, which until now were relinquished to solving few problems, become the most coveted currencies. Having the right answer at the right time in the right place has become critical for organizations in the new world of online communities, social networks, and digital transformation. The timing to find and use knowledge and content was the first thing to change: while in the past customers could've waited from a few hours to a few days, today they demand the right answers in real time.

Organizations don't need to retool and "forklift" their existing systems to provide for these changes, simply to change the way they generate, use, and maintain both knowledge and content. New paradigms of knowledge (knowledge-as-a-service, and collective knowledge) are becoming more requested and embraced by organizations. While deployments have not yet reached mainstream, we see more and more organizations seeking to leverage the power of social networks and communities – both internal and external to the organization – to deliver to customer expectations.

We see more and more organizations that are welcoming models of social knowledge (where the knowledge is generated and maintained in internal communities and social networks of experts versus knowledge bases) and aiming to deploy collective knowledge (where the knowledge resides entirely outside of the organization control and the communities manage the knowledge to the benefit of their users).

In the interim, available knowledge via subject matter experts (SME) (versus that stored in a knowledge base) and the ability to find and leverage those SME to deliver the right information, to the right place, at the right time is becoming the norm in planning. The evolution of existing KM solutions to accommodate the growth of communities and SME (whether internal or external to the

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organization) is the most sought-after feature in today's market. A complete framework that targets this evolution should be able to deliver knowledge that is:

- Aggregated and federated to have access to all information, content, and knowledge needed
- Easily leveraged and deployed across the organization
- Supportive of both new SME and communities-based models as well as traditional KM
- Evolutionary for today's changes and tomorrow demands

The next 12-18 months will show what models the organizations are creating to deliver the transformed interactions with the customers, and chances are high that evolutionary solutions will be in high demand.

This trend is already underway in many organizations and we will see more and more of these emerging in the next 24-36 months. Meanwhile, these writings will give you an idea of what's in store for organizations.

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From Knowledge-in-Storage to Knowledge-in-Use

When looking for innovations in knowledge management these past few years it was very hard: it was more of the same, maybe a tad faster. The problem was that the same old models and actions were taken – it was not about technology being new, it was about not doing something different. Knowledge has not changed much, honestly, so why should we do things differently?

Because the change has been in how we use it, not what we call it.

While there is a little bit of action in [collective knowledge, social knowledge, and even tribal knowledge](#)¹ those are just ways to generate, maintain, and use the knowledge, but they are just sources. The evolution is not just about the underlying technology to store more and search faster – it is about changing the paradigm, about changing perceptions, models, and ideas on how to leverage technology better.

This change requires us to reevaluate how we approach knowledge, from generation to use – and this is where we see the biggest change: we are demanding to have the right knowledge available at the right time, the right place, and the right way – without searching. We are moving from knowledge-in-storage to deploying systems for knowledge-in-use.

The problem with knowledge management, or at least the biggest problem, was not generating or storing the knowledge; I know of certain organizations that have tens of thousands of articles, how-to, manuals, technical specification sheets, data sheet, and varied other items stored for use by service, support, marketing, sales and even other functions that are not client-facing.

Storing is easy to do and the belief that a simple indexing of the content by keyword would be sufficient to find the information later tends to work for small knowledge bases, but as soon as they begin to grow or become part of a knowledge repository (where more than a single base is aggregated into a massive database of knowledge) then finding by indexed words is no longer feasible (in some cases, it takes longer – but mostly the sheer volume prevents from finding the needed piece of knowledge at all).

In addition to these issues, stored knowledge decays quite rapidly. For knowledge to be effective it needs to have two attributes: repeatability (the ability to be used time and again, not a single time), and accuracy (reflect the changes in the knowledge since its inception – even if small). The lack of these

¹ <http://www.stonecobra.com/five-benefits-of-using-collective-knowledge/>

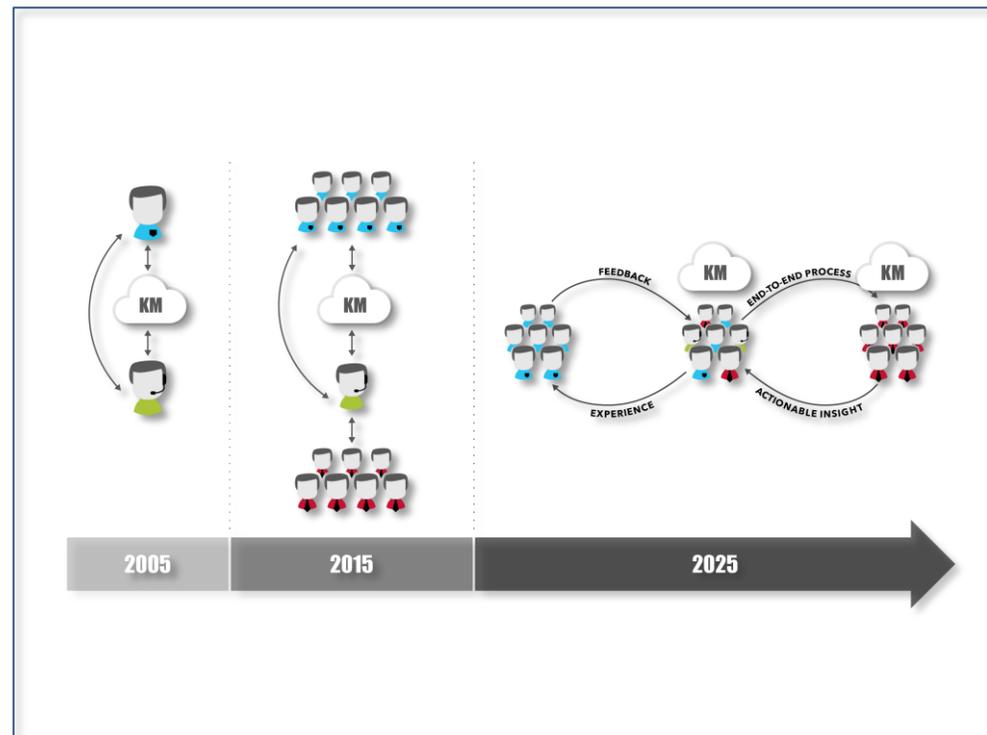
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Although storage solves the first item, repeatability, it is the cause for the lack of accuracy: if stored knowledge is not kept updated, it simply becomes inaccurate. At the rate humanity creates knowledge these days knowledge becomes obsolete rapidly. This is why we are witnessing a move from knowledge-in-storage to knowledge-in-use.

Knowledge-in-use refers to the ability to have the updated, accurate knowledge available immediately as needed and make use of it in the right setting, at the right time, for the right purpose. The main difference between knowledge-in-storage and knowledge-in-use is the source: knowledge-in-storage has been in a knowledgebase for some time, likely, and found using an index. Knowledge-in-use more than likely comes from a SME (subject matter expert) or from a collective knowledge community, has not been indexed, and it is relatively fresh (in the vast majority of cases, produced to answer the specific inquiry and useful only for a limited time).

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Knowledge-in-Storage to Social Knowledge to Collaborative Knowledge

Moving to a model of knowledge-in-use, while it requires the adoption and mastery of collective knowledge, a redeployment of processes, shifting the source

of knowledge, and a different mindframe among users that not having a stored answer is acceptable, as long as the right communities and SME are part of the extended communities that are available to provide an answer.

The last benefit from knowledge in use is the speed to answer. While simple inquiries are likely to be answered faster by a FAQ or a search box the adoption of knowledge-in-use is far superior for complex, real-time searches for knowledge. In no event is a knowledge-in-use model going to completely replace the traditional knowledge-in-storage one for simple inquiries: there is no justification for this. Alas, the best customer service organizations have known for many years to utilize different search and knowledge management techniques to answer questions. This is no exception.

There is no preset model or methodology for an organization to adopt and embrace knowledge-in-use, but the first step is always the same: make sure it is the right approach for your organization. If you find yourself updating the same articles time-and-again, or your entire knowledgebase seems outdated, or the information you manage changes rapidly – this may be the solution you are seeking. Finding the knowledge in real-time, or near real-time, is not simple. However, the results are outstanding.

Alas, to start the path towards this, we need to change the models of how we generate and maintain knowledge. To this end there is an evolution we created, one that ends in collective knowledge, but has social knowledge as the first step.

Let's explore it in more detail.

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The Story of Social Knowledge

The old model of creating and storing knowledge to eventually using it (*maybe*) is disappearing in favor of knowledge generated and maintained by users and communities.

Collective Knowledge is the ultimate goal for this paradigm: this is where communities populated by interested parties help each other by providing the necessary knowledge. The main difference with today's model of KM is that the communities essentially become the replacement for the knowledge-bases over time.

One of the things we discovered working through that model was that we need to cover the interim steps to get there; the story of Knowledge becoming social knowledge and eventually collective knowledge covers those steps.

There are four stages for the use of Knowledge in Customer Service:

four stages for the use of knowledge in customer service:

- 1) *disorganized*
- 2) *accessible*
- 3) *social*
- 4) *collective*

1. **Disorganized.** During this stage, there is no knowledge management to speak of. Either there is a collection of documents, or maybe a knowledge base exists – but it is incomplete, obsolete or never used. The “knowledge” generated and used at this stage comes from user’s minds – they know what they need to say to answer the most common questions and they may know who to ask for a one-time answer as they find the need. There are no documented processes or solutions to effectively manage generation and maintenance of knowledge – thus, each person becomes their own model of KM.
2. **Accessible.** This is the first model used for KM in the customer service world (and still remains the most common model). During this stage the organization creates structure out of the mess that the organization has. Segments of users are known and the general idea of their knowledge needs is also known or discoverable. Processes are in place for users and agents to create, access, and use similar-but-different versions of the answers (more complete for agents, a summary for customers) usually contained in a single knowledge repository
3. **Social.** The interim step to collective knowledge. This is the stage we are beginning to see implemented today leveraging communities, using tools for socializing online, and generally understanding the there is a mixed state between the ultra-advanced model of communities providing solutions and companies using single-repositories; that model is social, where users can easily access via social tools and technologies to contribute their knowledge to the organization – and in turn benefit from accessing the same community for their needs.

4. **Collective.** I won't restate what I said about collective before, but the summary is that once an organization masters leveraging their own people and known subject matter experts to create internal "communities of practice" they find new ways to work and to leverage also their customers' knowledge, their partners knowledge, and virtually any knowledge that exists in the world with the end purpose of generating more value for all stakeholders: employees, partners, customers and anyone else involved in making the organization successful.

This is a very condensed summary of this evolution and the beginning of the description of the interim step from Accessible to Collective Knowledge. That interim step is social knowledge.

What is Social Knowledge?

We put social knowledge into the proper context as one part of the evolution towards collaborative knowledge; the next step is to define what we mean by social knowledge.

I wrote some time ago a pseudo-definition for social knowledge that read:

Tapping into communities and subject matter experts, social knowledge moves away from the traditional knowledge-in-storage model of accumulating "stuff" in knowledge-bases to getting the information directly from the knowledge owner that has it.

This knowledge is used, cataloged, indexed and used again – but only as long as it is the right answer – after that, new answers become "the right answer".

Within these statements we have all the elements that make social knowledge work.

At the baseline social knowledge is the realization that knowledge bases don't contain all the necessary information.; while in certain instances (e.g. financial services and regulated industries) it may be necessary to have an "official" version of knowledge, in the real world knowledge is augmented each and every moment during usage; this is one of the driving forces for online communities.

The more you use knowledge management as part of your customer service endeavor, the more knowledge changes. The number of intricate combinations possible for use of any product of service by the large number of customers using them is astonishing.

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Even if there are “recommended” uses for the product, customers will always try new things and new combinations; as an example, I doubt very much that the inventors of duct tape thought it would be used one day to make clothes and other findings – yet, my daughters are living proof that is the only recognized use of duct tape (for them). Everything they ever needed to learn from how to use the product to make what they wanted to make came courtesy of YouTube via non-official videos of other people making the same things.

Organizations began to realize some time ago that the source of the answer lies within those experts, called Subject Matter Experts or SME, and their use of the product or service. This is marking the [shift in knowledge from Knowledge-in-Storage \(KiS\) to Knowledge-in-Use \(KiU\)](#)² we are seeing, and the beginning of social knowledge.

One caveat, whereas users still remain the ultimate source of how the product should be used, this is not an excuse to dump all knowledge management efforts in the path to creating user-only knowledge solutions. SME are a part of a total solution, not the only solution – there have been some organizations who have recently tried to outsource one-hundred percent of their knowledge management to communities with mixed results – at best.

However, the same model of communities and tapping into communities powered and populated by users can be used internally. SME can live within the enterprise as well as outside, but without the right technologies is hard to impossible to find them in a timely manner to use their knowledge.

Social knowledge does not just happen via external communities, it must also occur with internal SME in internal communities and eventually ending up in hybrid communities (see the chart accompanying my last post for more of this evolution). That is the next step, the evolutionary model of [collective intelligence](#)³.

It would be simplistic to say that is the only definition for social knowledge, but since it is the first step in a multi-iterative paradigm shift we need to add some of the elements that are necessary to make it work. Since a formula would have too many variables for any one organization to account for, I prefer to use a framework or template approach.

² <http://estebankolsky.com/2013/02/exploring-the-new-knowledge-paradigm-use-it-or-loose-it/>

³ <http://www.stonecobra.com/five-benefits-of-using-collective-knowledge/>

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A Social Knowledge Framework

Recently in conversations with practitioners a common element or issue has been showing up more and more: what to do about collective knowledge.

The quick rise in social networks and communities has brought a very big problem to organizations: there is a lot of value (potentially) in those channels – but we are not sure how to leverage that.

Social X is an evolution – not a revolution. You won't be able to get value from using social channels and communities unless you prepare your systems to take advantage of that.

With that in mind, here are the top six things you have to remember as you embark on the road to social knowledge:

six items to address in a social knowledge framework:

- 1) *subject matter experts*
- 2) *collaboration within established workflows*
- 3) *aggregation*
- 4) *multi-channel*
- 5) *the three R's*
- 6) *iteration to evolutionary*

- 1) **Subject Matter Experts.** The key to both social and collaborative knowledge is to have the right experts at hand. The evolution of knowledge is to focus more in those subject matter experts, be able to identify them, have them accessible and use their knowledge to answer questions and update content. The evolution towards social knowledge will need a solution that can “manage” these subject matter experts as the source of knowledge and maintenance of that knowledge.
- 2) **Collaboration within Established Workflows.** Just because we are going to use people instead of static knowledge bases, which still won't disappear, does not mean the need to generate and maintain entries into those bases goes away. The established workflows for content generation and maintenance need to be upgraded to both reflect the use of different sources as well as more relaxed flows for dynamic, constantly shifting knowledge.
- 3) **Aggregation.** Of course, once we have several sources for knowledge the issue of federated knowledge bases comes up very quickly – and while important, it is not as critical as being able to aggregate the real-time knowledge from communities and SME. Definitely a framework to migrate forward in knowledge must include a way to aggregate all this knowledge: static and real-time, and the in-between use of SME.
- 4) **Multi-Channel.** As much as I would hope this goes without saying, I am still getting calls and inquiries from customers that are not sure if they should use one source of knowledge for all channels (in their defense, they do think it is a good idea – they are just not sure of how to do it, or if their solution can do it). This goes without saying now: single source of aggregated knowledge for all channels.

- 5) **Three “R”s.** The concept of the three R’s (right answer, right channel, and right time) talks to timeliness and accuracy more than it does to being able to distribute over multiple channels (see point #4 above). Under the assumption that we can distribute to all channels equally, the next consideration is making sure the right answer at the right time reaches the intended recipient – being able to deliver (leveraging real-time knowledge from SME) is a key feature of these evolved scenarios.
- 6) **Evolutionary.** Proposing an evolution from current KM to social knowledge and eventually to collective knowledge means migrating existing solutions to the new models. This migration requires the new solutions to temporarily support the old models to ensure a graceful transition (especially when using federated knowledge bases with partners or non-traditional contributions to the knowledge base).

Following these steps is bound to prepare you to become better at tapping into social channels, internally. and leverage information collected (and SME found) to become fresh and updated knowledge.

Achieving the status of social knowledge, as we have been saying, is the necessary first – but an interim – step towards collective knowledge.

Let’s explore what happens after we arrived to social knowledge, and eventually to collective knowledge.

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Five Benefits of Using Collective Knowledge

There are three core problems we are facing in KM today: source, storage, and use of knowledge; collective knowledge is a potential solution.

Collective Knowledge, which some improperly call [tribal knowledge](#)⁴, is as simple as using internal and external social networks to create, maintain, and provide access to knowledge heretofore unavailable. It can, of course, become [very complicated](#)⁵ from there.

There are today [few good](#)⁶, formal examples of this, although a large number of the online communities created in the past few years by organizations (and the very few freely created by users) are probably the closest example. When we hear of [KLM](#)⁷ or [McDonald's](#)⁸ creating a public forum or a facebook page to answer their customers' questions, this is usually what we are referring to. Alas, there are no published studies of collective knowledge that also leverages social knowledge to become better.

The promise of Collective Knowledge (internal and external communities contributing to a better knowledge ecosystem) has two great benefits for both organizations and customers: access [to SME \(Subject Matter Experts\)](#)⁹ that are not part of the organization's support structure and generating knowledge that can be leveraged extensively throughout that ecosystem.

As with any other ecosystem, the use of platforms and open and free access is a must; "[walled gardens](#)"¹⁰ where the knowledge is not free to everyone and everything is then antithesis of what a Collective Knowledge model should be.

This has been, so far, the greatest challenge for organizations. We spent untold number of years telling them to closely monitor how, by whom, and why knowledge is generated and managed and now we are telling the exact opposite – how is this reconcilable?

Therein lays the key success factor of Collective Knowledge: leverage.

⁴ http://en.wikipedia.org/wiki/Tribal_knowledge

⁵ http://en.wikipedia.org/wiki/Collective_intelligence

⁶ <http://venturebeat.com/2012/10/18/study-brands-dont-listen-answering-fewer-than-half-of-customer-questions-on-facebook-and-twitter-infographic/>

⁷ <http://www.simplyzesty.com/Blog/Article/September-2011/KLM-Launch-Brilliant-Twitter-Campaign-To-Highlight-Their-Social-Media-Customer-Service>

⁸ <http://www.foxnews.com/leisure/2012/08/03/mcdonald-tries-to-dispel-food-myths-with-new-social-media-campaign/>

⁹ http://en.wikipedia.org/wiki/Subject-matter_expert

¹⁰ [http://en.wikipedia.org/wiki/Walled_garden_\(technology\)](http://en.wikipedia.org/wiki/Walled_garden_(technology))

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We are not going to throw existing content management systems and methodologies nor are we going to let anyone or anything create corporate knowledge. However, we are going to leverage the expertise of those outside of the organization by providing them three things: a repository to store and manage knowledge, access to kin-minded individuals willing to contribute that knowledge, and the ability to do it – partially – outside of the confines of the corporate systems we have in place for knowledge management.

In this exchange users benefit from access to structured storage and collaboration platforms and the organization benefits from leveraging the knowledge into systems and processes. Indeed, it is this leverage that brings out the value of Collective Knowledge. Being able to use the knowledge generated in collective environments in different functions and units across the organization provides sufficient justification, without a single department being responsible for the weight of supporting the solution.

There are five ways an organization will benefit:

five ways an organization benefits from collective knowledge:

- 1) *access to-the-moment expertise*
- 2) *validation for their actions and knowledge*
- 3) *feedback for their products and services*
- 4) *reduced costs through indirect outsourcing*
- 5) *source of knowledge to augment and improve repositories*

1. **Access To-The-Moment Expertise** –the best source of knowledge for any organization remains outside of their walls. The users are the ones who know better how to use (and how to fix) any product or service – even in cases where it remains the organization’s responsibility to assist them (cable providers needing to reset a modem, for example). The users usually know first, before the organization, problems and likely solutions and workarounds. Being able to access them faster than traditional methods means the organization can get a head-start in warding off calls from customers, acting proactively in certain instances, and deliver effective answers to those calls that do get through.
2. **Validation For Their Actions And Knowledge** – in those cases where an organization does create a knowledge entry the access to the Collective Knowledge provides validation. There is nothing faster to know if a fix or new feature works than releasing it to users. The problem until now has been to find sufficient users to test and ensure the new or fixed feature works as expected (and does not break anything else). Thanks to online communities and Collective Knowledge these issues can be quickly and efficiently solved, tested, and released to the entire population – with almost immediate validation.
3. **Feedback For Their Products And Services** –leverage for the collective knowledge has to extend beyond the traditional customer service functions typically associated with KM. Feedback, and the routing of the

information to research and development departments as well as other places throughout the organization, is one of the hidden values of Collective Knowledge. It has been proven that users are more “truthful” (or less biased in a better sense) in online communities where Collective Knowledge typically is collected. The ability to parse the information they provide, distill insights, and use those to improve products and services (or even create new ones if necessary) is the underlying power of co-creation events associated with social networks.

4. **Reduced Costs Through Indirect Outsourcing** – although much has been done about reducing the costs of knowledge generation and maintenance by letting users handle it in online communities, the reality is that it is not always true. In some cases, the costs will likely increase as the need to accommodate unknown processes and elements associated with knowledge may result in extra personnel, licenses, or even lengthier processing time. However, Marketing has proven that generating market knowledge, previously done by market research firms over far longer times and at a much greater expense, from consumers on collective environments is faster and cheaper than previously done. Customer service has proven similar by offloading multi-channel transactions from man-powered ones to collective environments where other users provide answers. It takes finding the right use cases, and making sure that the knowledge generated supports the needs.

5. **Source Of Knowledge To Augment And Improve Repositories** – in addition to the up-to-the-moment access to latest-and-greatest information, organizations can leverage Collective Knowledge to power, improve, and maintain their existing knowledge repositories. This source of knowledge, whether it is an original source creating the knowledge or a secondary force aiding in the maintenance and grooming of the same, is the ultimate leverage. Organizations that understand how to use these setups enjoy better knowledge bases, more complete and more relevant. The savings in resources and the benefits of delivering more effective solutions to their clients more than justified the time and patience to implement Collective Knowledge.

As you can see, there are potential benefits if you take the time to see how Collective Knowledge can work in your organization to your advantage. There is no “silver bullet” that will let you succeed each time regardless, but you can see the areas where it may make a difference.

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“you just need to start”

The next step is to align the information above with your needs and your organization’s solutions already in place, find the right contributors for your online communities and try.

As you use it more, you will find more ways to leverage the setup to your advantage across the organization – both for social knowledge as well as for collective knowledge.

You just need to start.