



# Knowledge harvesting

**Tom Young** provides guidance on how to recognise, capture and retain the knowledge that can be used for business benefit, using the 'knowledge-harvesting' process.

**I**n almost all organisations, you will find a process of lessons capture from activity, operations, cases and projects. A process of knowledge harvesting (or knowledge retention) from individuals is far less common. This article will look at knowledge harvesting. While the comments in this paper will be directed at a general audience, particular reference will be made to knowledge harvesting within a legal environment.

I will avoid the cheap jokes about lawyers, but rather acknowledge that the legal environment is distinctive. Having said that, each business environment has its own unique characteristics, which have to be factored into the design of your knowledge-harvesting process. Manufacturing is different from sales, sales is different from construction. This is why you need to understand

the context and business environment when designing a knowledge-harvesting process. Replicating the harvesting process from one industry or profession to another doesn't necessary work.

## Definition

Some definitions are probably required at this point. I will use the terms knowledge and best practice, almost as interchangeable terms. My intention is to refer to the knowledge that the organisation can utilise for business benefit. To me, it doesn't really matter what terminology is used as long as we are relatively clear and aligned on what the desired outcome is. That is, an improvement in the level of performance of the activity that the organisation is currently undertaking, or a reduction in the risk of reduced performance if knowledge is lost.

That desired outcome might be to manage the risk of losing key knowledge in areas such as how to win clients, the cost or time to service a client, the time to research and create a brief and the degree to which you retain staff. Knowledge harvesting is a process to manage the risk of knowledge loss.

## Process

When considering knowledge harvesting it is vital – let me repeat that, vital – to focus on the key knowledge required to drive performance. Do not attempt to harvest all the knowledge and all the experience of your organisation. Attempting to harvest all the knowledge in each practice area would require enormous resources and would be of questionable value.

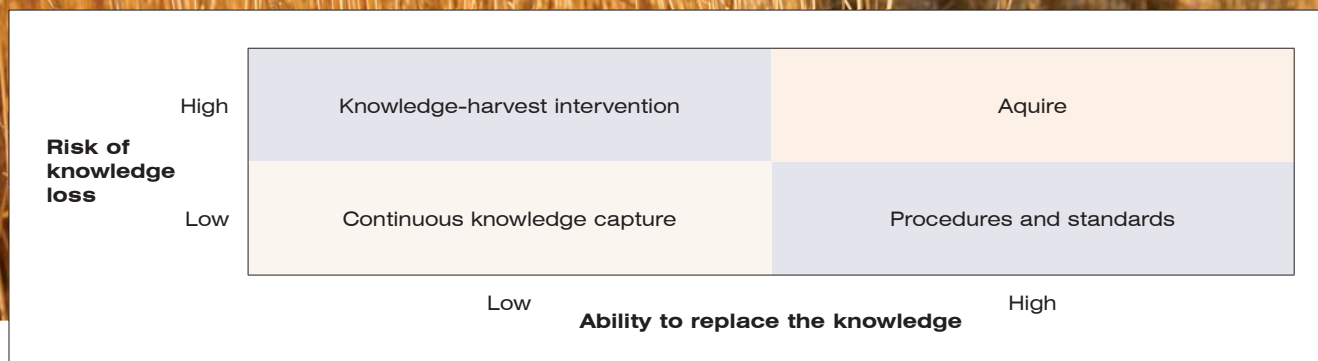


Figure 1: Prioritisation matrix to prioritise harvesting efforts

Let's move on to consider what knowledge your organisation needs to harvest.

**What to harvest**

Please don't waste valuable resources in trying to harvest everything. Focus on the knowledge that you can't afford to lose. An excellent way of ensuring that you focus on this key knowledge is to create a prioritisation matrix (Figure 1). This plots the organisation's ability to replace the knowledge along the horizontal axis and the risk of knowledge loss on the vertical axis. Ability to replace means the ability of your organisation to replace that knowledge should be it lost due to it not having been harvested in the first place. For example, could you go out and buy the knowledge on the open market if required? Perhaps you could engage a research company to create the best practice for you, but at a cost both in terms of time and money. The risk of knowledge loss could be the thought of knowledge being lost due to staff leaving. Perhaps all of your critical knowledge of a particular area of law is in the head of a single lawyer, who is rapidly approaching retirement age?

The focus of your knowledge-harvesting work should be the top-left hand quadrant – knowledge that is at high risk of loss, with a low ability to replace that knowledge should it be lost.

The other thing to consider is who will this knowledge be harvested from and what resources will be required to do that.

**Who to harvest from?**

If you have constructed a matrix similar to that shown in Figure 1, then you're going to be focused on the top left-hand corner, the areas in which we can see that there is a high risk of knowledge loss and you have a low level of ability to replace that knowledge; the box we have called knowledge-harvest intervention. An example of the matrix populated with the knowledge that is at risk might look like Figure 2. In this example, knowledge about water rights and the law as practised by indigenous

the knowledge that they possess about topics that the practice needs access to.

**Who does the harvesting?**

Having decided what knowledge needs to be harvested, you will need to consider who will do the harvesting. There are essentially two generic methods available – self-harvesting and assisted harvesting.

For self-harvesting to work the person involved has to have the time and inclination to do the harvesting. If you are going to use self-harvesting

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people have been identified as being at risk. (Please remember that your diagram will be very specific to your practice and will change over time).

A valuable next step is to identify those individuals who are associated with that key knowledge and transcribe their names on to Figure 2, to produce Figure 3. In this example we can see that knowledge of water rights is associated with 'P Davis', and indigenous people law with 'R MacDonald'. Perhaps they are due to retire in the very near future or they have indicated that they will be leaving the practice. Whatever the reason, it has now been identified that the practice is at risk of losing access to

it is beneficial to provide detailed guidance to the provider on what the recipients think they need and also the level of detail to be provided. If we assume for a moment, that the knowledge that you wish to harvest is in the head of a client-facing lawyer, the probability of them having the time to document what they know by themselves is almost non-existent. The pressure on today's lawyer to generate fee income for the organisation should not be underestimated. In today's legal practice, it is not unusual to find targets being set that each lawyer has to achieve or their future career path in the organisation may be surprisingly short. This is the reality for many. Given that



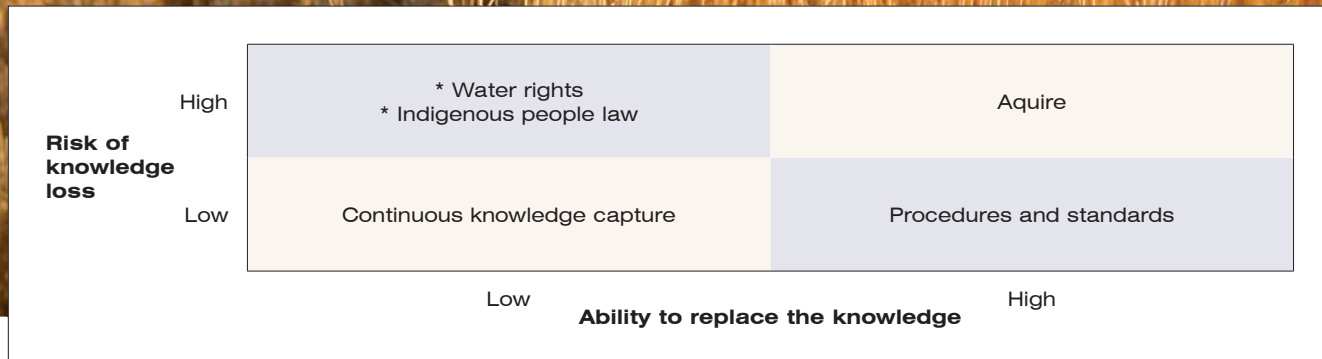


Figure 2: The prioritisation matrix populated with examples of knowledge at risk

environment, assuming that knowledge harvesting will just happen and will provide the benefits that the practice desires without a carefully thought-out strategy and implementation plan could be risky. If that is the situation you face in your organisation then an alternative tactic has to be employed.

Assisted harvesting is where someone interviews and documents the thoughts and insights from the person who has the knowledge. Before conducting the interview they would normally consult with the recipients of

The key is for the PSLs to identify that knowledge the organisation needs to harvest and to work with the fee-earning, client-facing lawyers to harvest, package, and transfer that key learning so that it can be used to generate future fees.

#### How to harvest

Given that the PSL is normally an experienced and senior lawyer, they will have a background in and an understanding of the topic to be harvested. The knowledge-harvesting

asking the interviewee what, in their opinion, are the key themes that you should cover during the interview. It is worth sharing this with the knowledge receivers just in case it sparks areas that they had forgotten to identify. When you are conducting the interview, try to avoid open-plan office areas or other rooms where the interviewee could be distracted. Take detailed notes and if possible record the conversation and have a transcript produced. Having a transcript to work from when packaging makes it a lot easier but remember that the transcript can easily run to 40 or more pages of type. Plan the interview around sessions of about an hour. Check against your list of themes to ensure that you are covering the areas that you need to cover as it is very easy for the interviewee to talk without necessarily covering the areas that you are interested. Also ensure that the interviewee is providing sufficient detail to enable someone to replicate and implement their advice. So for example if they say: 'Allow sufficient time', you should ask the follow up question: 'How much time is sufficient time, and when would you start the activity?'. Always keep in mind that you might only get one opportunity to interview the person who has that knowledge so careful planning and using someone with experience in knowledge harvesting is essential. If your organisation currently doesn't have anyone skilled in knowledge harvesting, don't worry, it is a skill that can be taught.

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the knowledge to find out what they want to know, then use that to steer and shape the interview. This is an ideal role for someone in the internal knowledge management (KM) team. In some legal practices, the know-how partner would work with the in-house KM team to identify and populate the diagram shown in Figure 2. At global firm Baker & McKenzie, the know-how partners are fee-earning partners with an additional responsibility for overseeing the KM objectives and plans within its legal departments<sup>1</sup>. This is a role similar to the knowledge engineer or knowledge manager in other industries.

Some organisations are now using PSLs [professional support lawyers].

interview needs to be planned and well executed as you may have only one opportunity to do it before the person leaves the company. Start by asking the intended audience what they would ask if they were doing the interview. Compile this into a set of themes that you can provide to the interviewee in advance to enable them to prepare their thoughts, but also to collect any supporting documentation and other artefacts that they may wish to pass on. Avoid the temptation to provide them with detailed questions as this has a tendency to narrow down the conversation to answering these specific questions rather than allowing an exploration of the topic. It is also worth

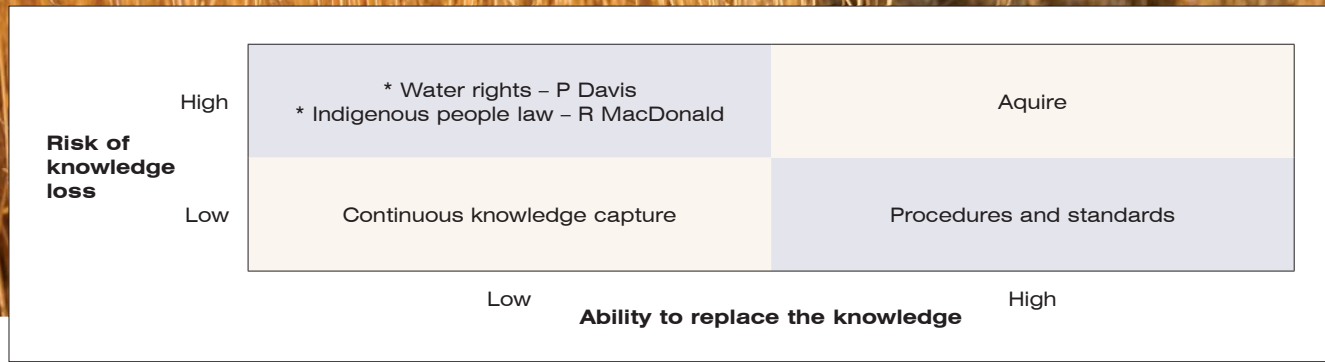


Figure 3: Who has the knowledge that has to be harvested?

Because of their experience and background, PSLs can be used in transferring the case studies to younger members of staff *via* in-house training courses and modules. The PSL updates procedures, case notes, precedent drafting, legal updates and newsletters with this learning but frequently goes a step further to closing the learning cycle and organises and conducts training seminars to ensure that younger staff or new starters have taken the new learning on board.

**Publishing**

There is a tendency to focus on the front end or capture part of harvesting but this may lead to disappointment in the end. I often suggest to people that they start at the end and work back. Start with the person who is going to use this knowledge in mind, think about their normal way of working, the way they prefer communications to be received. If they are newly graduated then receiving things in written form or in web pages could well be the norm for them. However if they have been in practice for a number of years they may prefer to receive things in verbal briefings or in the form of case studies. Think through who your intended audience will be and determine in which way they would prefer to receive that material before generating it. It's a lot easier to tailor the capture process at the beginning to give you the desired format rather than capture material and then try to shape it into the format you're looking for.

While KM commonly refers to the packaged material as a knowledge asset, this may not be the best terminology in legal organisations. In a legal environment you may wish to refer to it as a legal update, newsletter, advice or precedent on a particular topic. Be sure to use the terminology that the end user is comfortable with and will recognise.

In terms of technology, again start from the point of view of the end user of this material. Do they need instant access to it no matter where they are?

**Managing risk**

Many organisations that do not have well-developed, fully embedded KM systems, often find that some of their crucial knowledge is at high risk of leaving the practice. In this situation knowledge harvesting is an excellent method of managing that risk. If this is your situation, then plan your harvesting campaign, determine who your focus is, what topics you need to harvest, and who will do it. Then develop the skills of knowledge interviewing

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Can you assume that they will always be sitting at a desk inside their office? Are there any particular security aspects associated with the material? All of these questions will have a direct impact on how you make the material available to the individuals.

The other thing to consider is the degree to which you want them to be able to interact with the material. For example, do you want them to be able to annotate the document so that the know-how partner can update the original document? Wikis, for example, can be used to capture thoughts and comments. The choice of technology will be dependent on the degree to which you want people to be able to interact with the document.

and packaging. This may be the most valuable investment of time and resource that you make. [Knowledge](#)

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**References**

1. Young, Tom., *Knowledge Management for Services, Operations and Manufacturing*, Chandos Publishing, p98