Chapter 3
Planning for Knowledge Management:
Conducting a Knowledge Assessment

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ABSTRACT

As data, information, and knowledge proliferate, professionals continue to grapple with the need to get their arms (or head) around it all. Needs analysis, information audits, and knowledge audits represent a range of processes intended to aid in understanding what an organization knows and how the workers can best access the knowledge. The chapter examines the knowledge assessment process with practical examples based on project experience. Drawing on case reports from the literature and studies undertaken by the author, the chapter addresses various methodologies, possible outcomes, typical challenges, and occasional pitfalls. The author’s experience sheds light on techniques and strategies leading to strategic recommendations and successful project results.

INTRODUCTION: TAKE STOCK

Knowledge management (KM) begins with knowing what you know and do not know - and understanding the consequences. Experts agree that a successful knowledge management initiative will begin with a baseline of insight into an organization’s current knowledge related practices, and some will go so far as to say that KM initiatives fail in the absence of an audit or in the absence of understanding the role of information in the enterprise.

This chapter looks at the knowledge assessment as a key component of the knowledge management process, beginning with what to call it and ending with a discussion of trends and future directions. Using case studies and highlighting specific tips and examples through the Theory in Practice feature, the chapter covers background and history, jus-
First things first: What do we call the process? The literature includes at least the following terms and probably more: knowledge audit, knowledge assessment, information audit, gaps analysis, needs assessment, library services study, information services study, knowledge resource inventory. While these names are often used interchangeably, they are not synonymous. Rather, they represent a continuum of processes in the attempt to understand how knowledge workers get, store, and share information and knowledge. Just as data becomes information that then becomes knowledge, understanding the process and how it impacts workers depends on needs analysis, information analysis (audit), and knowledge assessment (audit). A needs analysis tends to focus on what knowledge workers require in order to do their jobs. An information audit will examine how information assets are used, how they move, and how they support organizational goals. A knowledge audit includes analysis of tacit knowledge (generally found in the heads of knowledge workers) and explicit knowledge (found in reports, databases, books, and other objects). Gaps analysis, needs assessment, and library services studies represent subsets or portions of a larger audit project. Which terms to use will depend on two questions: 1) Where is the organization in the KM process? and 2) What language will resonate within the organization’s culture?

For the purposes of this chapter, the broadest and all encompassing term is knowledge assessment. More specific terms such as needs analysis, information audit, or knowledge audit are used when appropriate.

**Where Is the Organization in the KM Process?** In a paper presented at the Global 2000 Worldwide Conference on Special Librarianship, Susan Henczel (2000) suggests that the needs analysis, information audit, and knowledge audit help move an organization from information management to knowledge management. Figure 1 shows where each of these projects fits into the KM process. Henczel expresses a distinction between these

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*Figure 1. Knowledge assessment and the KM process ©Susan Henczel (used with permission)*
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