



Klever Knowledge Benchmark Report 2016

THE  
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2016



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Klever is a global enterprise software and services company. Unlike firms that advocate a purely technology-based solution, Klever improves the people and process side of service effectiveness. We make existing enterprise support platforms better by improving productivity with tried and tested techniques. With the help of Klever software and services you will be able to integrate knowledge about your Customers with knowledge about your Business and provide lasting value to both. Only Klever combines technology and methodology. Process and principle. Quality tools supported by deep hands-on expertise. Using Klever knowledge sharing and collaboration techniques every person in your organization can be empowered with immediate access to your best knowledge and expertise. And, you could improve productivity from 30-300% in just three months.

The Klever team is passionate about helping organizations leverage and share their most valuable asset - their knowledge.

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## Executive Summary

### Key Findings

Our analysis of the data revealed three important findings in organizations' perceptions of their knowledge-sharing programs.

*Leaders are embracing the need to relay the importance of knowledge-sharing practices **and** team members are hearing them.*

Sixty-seven and one half percent of team member respondents said that leadership always or often clearly communicates the importance of knowledge and learning. While leaders said that they perceive that they are driving their organization to be less command-and-control and more focused on sharing what team members know. This is a significant improvement from last year, where only 31.3% of respondents agreed that leadership always or often communicates the importance of knowledge-sharing practices.

*Alignment is critical for executives to see success in their business outcomes and for team members to understand how sharing knowledge drives those outcomes.*

*Teams are not gaining ground on firefighting, and just 4% believe they are sharing knowledge as effectively as they can.*

With the exception of those in middle-sized organizations (1,001-5,000 employees), all other respondents ranked their organization worst in proactive work. Only 31.96% of respondents said that their team often or always invests as much time in fixing the root causes of the fires as we do in fighting fires.

Old habits die hard, even in big organizations. Firefighting remains a deeply rooted organizational behavior for nearly 70% of respondents, even as support teams embrace knowledge management. This backsliding into older behaviors drives support costs up and reduces customer satisfaction, as team members go back to solving this one problem, albeit urgent, **on their own**. Even though they understand and embrace the importance of knowledge sharing, crisis situations turn team members into silos at the time when customers need—and expect—they to cooperate and find *patterns, workarounds* and eventual *root-cause fixes*.

Organizations are still struggling with this challenge, as 31.1% responded the same way last year, showing that organizations have only improved marginally (2.7%) in this area. The backslide into firefighting remains one of the critical challenges for getting the most out of your team's knowledge.

*Processes and communications are critical to successful knowledge management, but deeply ingrained behaviors can still slip through at times of stress.*

*Technology continues to fall short of the promise to enable best practices, but is starting to catch up.*

While leaders and front-line team members highlighted the importance of alignment, middle managers focused their attention on the continued challenges with knowledge-sharing technologies. Only 23% of managers said that the technology they have makes it easy to share information within the company, rating it the lowest of any of the groups. This speaks to the managers' perception of their role in the knowledge-sharing process and their lack of focus on driving alignment between leaders and front-line team members. This perception remained relatively constant since last year, with middle managers rating technology only slightly better this year (4.7% improvement in technology ranking, as compared to a 11.6% improvement in the same ranking for executives, with a very slight dip for team members, under 2%).

*Middle managers' most important task is to provide context for the team by aligning the team members' day-to-day work with the outcomes that executives care most about.*

### **Noteworthy changes from last year's benchmark**

*The technology blame game is softening.*

This year, respondents were more positive in their impressions of the fit of their technologies with their knowledge programs, an 8.3% increase. While technology as a group was rated lowest by the respondents, the two questions about technology did not receive the lowest individual scores (as they did last year): "The technology we have makes it easy to share information within the company," and "Most people would agree that we need to invest in knowledge-sharing processes before purchasing technology."

Last year, both technology benchmarks were lowest. While this improvement is noteworthy, it does not mean that technology is making knowledge-sharing practices a seamless part of the support process. It does mean that organizations are recognizing that other areas are negatively impacting their knowledge programs as much or more than the tools. We could look to the decline of the culture benchmark on firefighting, the lowest benchmark overall and the only benchmark this year to rate below a 3 out of 5 on the Likert scale, as one clear example.

*Executives are promoting learning better, improving upon that disconnect by 18%*

A key disconnect in last year's benchmark survey was that executives actively promoted sharing knowledge in the team, but did not also promote individual team-member learning. The result was a message to the team that the organization wanted to make better use of the member's knowledge, but not invest in providing these same team members additional skills. This trend has turned around as there is a significant improvement in the perceptions of leader's promotion of learning over last year's benchmark. Promoting learning is a key element in a healthy knowledge-sharing culture, and respondents said that executives have taken this seriously. The respondents scored this benchmark .37 higher than the previous year (an 18% improvement).

*Beliefs run deep that knowledge sharing leads to greater productivity and effectiveness.*

This bodes well for future gains. When asked “If people in your workplace were sharing knowledge as well as they possibly could, it would improve productivity by,” nearly 50% of respondents believe that their organization could be at least 30% more productive if they shared knowledge better.

## The Report

*Perceptions of the success of knowledge-sharing programs are reality. They directly influence buy-in, engagement, and long-term success.*

Today's global competition demands that team members have to access the knowledge they need as close to their real-time need as possible. One study suggested that organizations are losing \$1.9 Trillion in potential value by not adopting knowledge-sharing practices.<sup>1</sup> Add to that the sheer torrent of information that organizations create. Effectively sharing knowledge is not a choice, it is an imperative.

Klever's Benchmark Report, *The State of Knowledge Sharing 2016*, aggregates data from 198 unique responses from industry leaders, executives, operational managers, and team members in organizations that either have an existing knowledge-sharing program or are contemplating one.

For knowledge sharing to succeed over time in an organization, there are four distinct areas that need to be addressed:

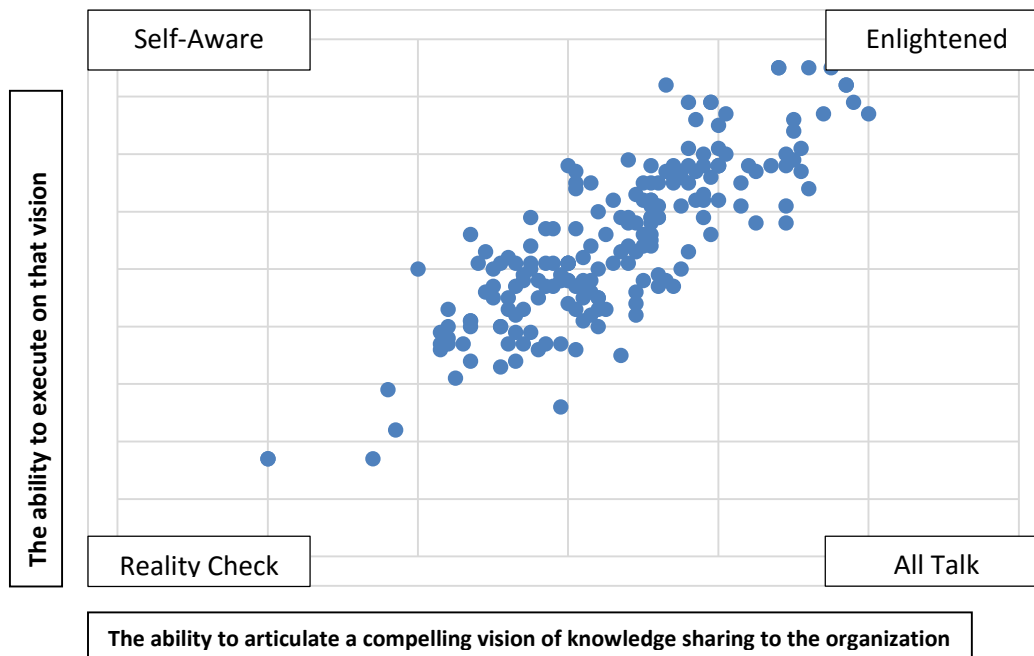
- People / Leadership
- Process
- Technology
- Culture



To gauge the perceptions of knowledge sharing across these four important dimensions, we asked 14 simple yet powerful questions. The findings are based on a statistical analysis of the responses, filtered through Klever's combined five decades of practical experience in launching, sustaining, and reinvigorating knowledge-sharing programs.



## Klever Knowledge Sharing Quadrant



The Klever survey tool segregates responses into four areas based on a proprietary weighting formula. It assigns a quadrant based on perceptions of two different organization capabilities:

- The ability to articulate a compelling vision of knowledge sharing to the organization (the x axis);
- The ability to execute on that vision (the y axis).

**Like last year, most respondents (78.6%) said that they were either 1) successful at articulating and executing on a vision for knowledge sharing or 2) they were able to accomplish neither effectively.**

This trend was consistent across size of organizations sampled and self-identified job functions.

### Benchmark Quadrants

**All Talk.** Organizations in this category typically have a strategic vision, but can't quite deliver on the tactical side. In other words, they have a plan but they're struggling to execute. The difficulty may be a gap between knowing and doing, a lack of resources, or perhaps management gets distracted by the latest "shiny object."

**Reality Check.** Organizations in this category typically fall into one of two groups: 1) They're new to knowledge sharing and aren't quite sure where to begin, or 2) they've tried knowledge sharing before but got stuck. Why? Often it's the lack of ongoing commitment after the excitement of the launch, or perhaps the executive sponsor got distracted by the latest "shiny object."

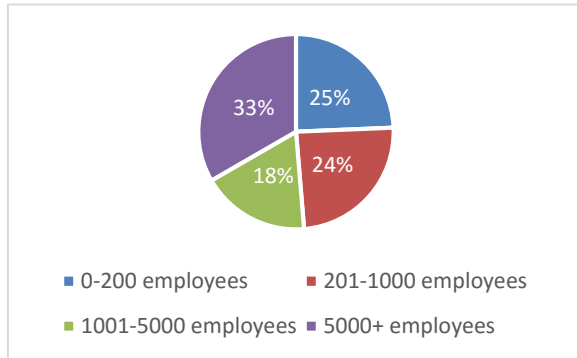
**Self-Aware.** Organizations in this category execute fairly well on tactical objectives. They probably follow procedures properly and take care of escalations and crises after they erupt. However, they fall behind industry colleagues by not doing as well on strategic issues. For example, do they take the time to step back and think about how to prevent crises from happening – especially the ones that happen again and again?

**Enlightened.** Organizations score in this rarified category for one of two reasons: There is a strong leader who is experienced and informed about knowledge sharing or that they are a relatively small organization.

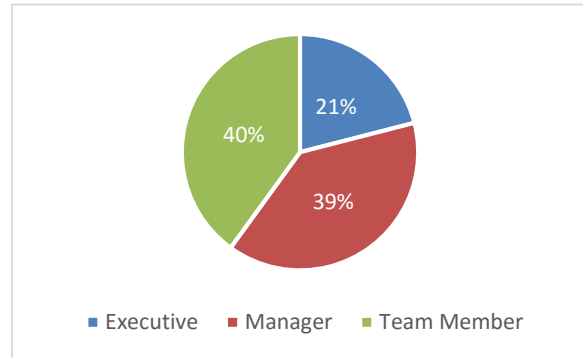
## Survey Respondents

This year we received a different mix of responses, with a larger portion of our responses coming from big companies (fully 33% from companies with more than 5,000 employees). But, we continue to be pleased with the balance of different sized companies, with no one group dominating the results. We were particularly pleased with a healthy mix of responses from different perspectives. Last year 74% of respondents were executives or managers, while this year only 60% were. Getting a healthy response rate from all three stakeholder groups was crucial to this benchmark report, as it uncovered very important conclusions about the alignment of the three.

**Survey Respondents – By Company Size**



**Survey Respondents – By Job Function**



## Knowledge Sharing Benchmarks

In order for an organization to effectively share knowledge over time, it has to succeed in two important ways:

1. Team members have to be motivated to share their knowledge, and
2. Sharing knowledge has to be embedded in the team's workflow.

Often, an organization's understanding of its knowledge-sharing program is derived from the top down. They understand the changes made to tools, practices, measures, and communications. In many cases, however, they do not know if these changes have made an impact on the motivation of the team or if sharing knowledge is truly integrated into the day-to-day work of the team.

There are four areas that illuminate the organization's relative success in these two important ways:

- People/Leadership
- Technology
- Process
- Culture

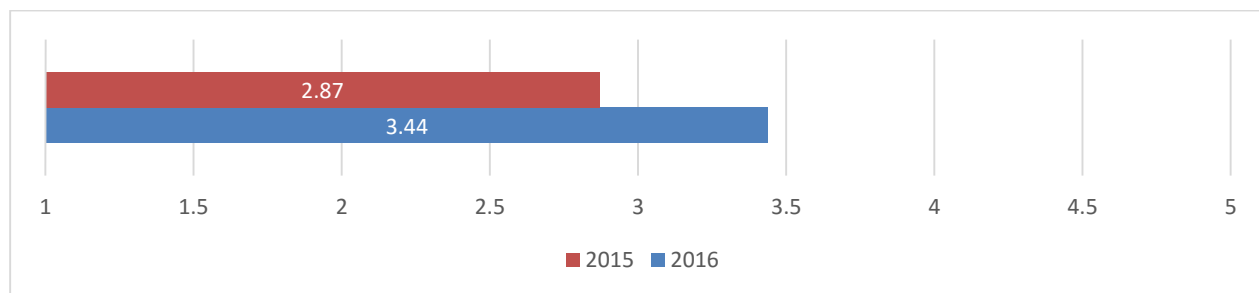
Klever has created 14 knowledge sharing benchmarks that uncover organizational strengths and weaknesses for these four areas. While the responses to these questions do not directly report on the activities that organizations are engaged in, they do uncover the degree to which those activities have affected its mindset. They also speak to the organization's perception of the adequacy of the processes and tools they currently have in place. Why is understanding these perceptions so critical?

*Perceptions of the success of knowledge-sharing programs are reality. They directly influence buy-in, engagement, and long-term success.*

## Process Benchmarks

This year, the process area was once again rated the highest by all three stakeholder groups. Fifty-one percent of all respondents said that the processes in their organization support knowledge sharing always or often (that number jumps to 82% when adding respondents who said this is sometimes true). This finding supports the continued interest and investment in popular knowledge-sharing best practices like Communities of Practice and Knowledge-Centered Support<sup>SM1</sup>. All three benchmarks in the process area were rated in the top five overall, demonstrating a continued interest in integrating knowledge into the work team members do every day.

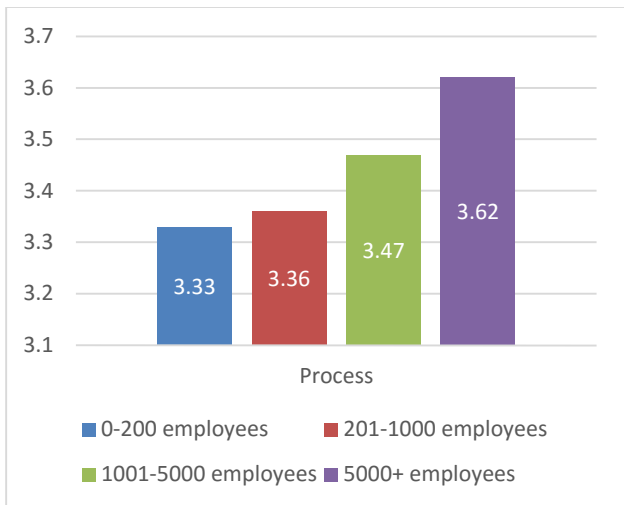
### Process average



Two findings deserve mention in this area. First, executives have heard the steady message from best practice promoters – that they must continue to communicate the importance of sharing knowledge to services and support – and are acting on it. The top rated benchmark overall was that leadership clearly communicates the importance of knowledge and learning, with 57% of respondents saying this is true often or always.

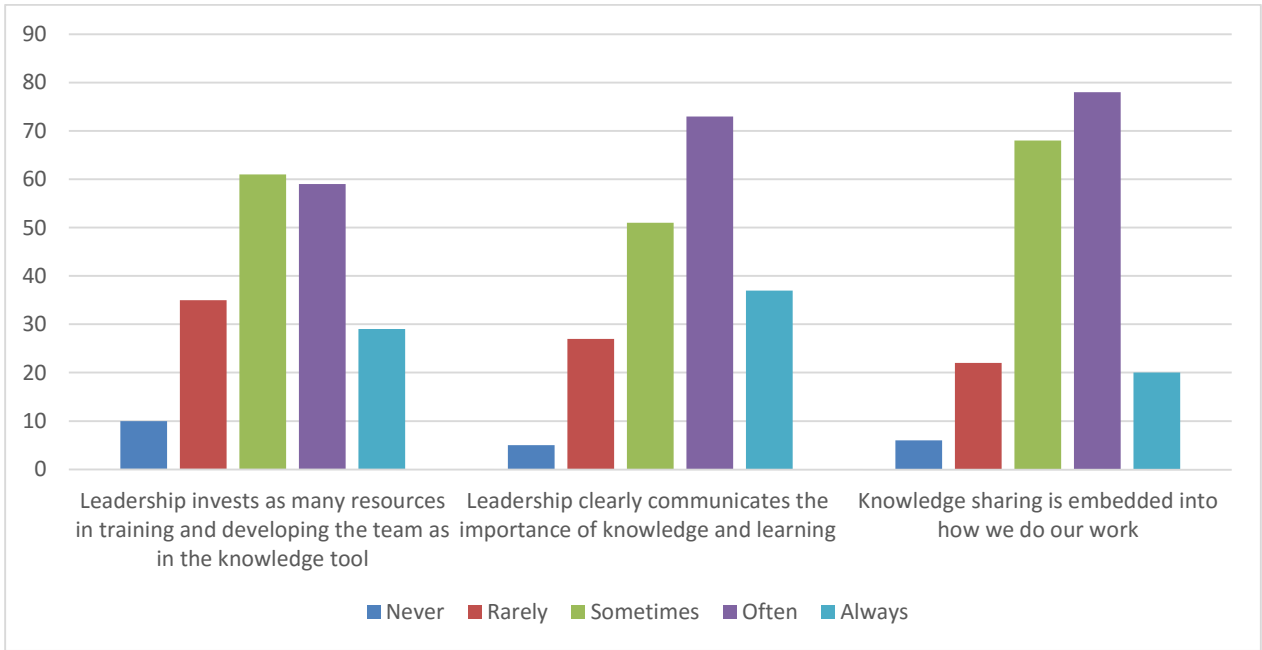
The second finding is that process satisfaction grows as organizations grow. The largest organizations are the most satisfied with the fit of their processes and knowledge-sharing practices. This finding certainly speaks to the relative importance of process to running large scale organizations, but also to the origins of knowledge-sharing practices in large support teams. Many large organizations have acted as laboratories for the development of knowledge-sharing practices and have had more time to make them part of their support processes.

<sup>1</sup> Knowledge-Centered Support is a service mark of the Consortium for Service Innovation – <http://www.serviceinnovation.org>.



The findings show that small and medium-sized companies have an opportunity to adopt knowledge-sharing practices earlier. If a small team starts contributing to a knowledge base, even when it is easier to ask a question over the cubicle wall, their investment will pay off when the next person (or 10 people) are brought into the team. It is also important to note that knowledge-sharing processes are not designed to slow teams down, but to speed them up. In some small organizations, team members see processes as an impediment to pivoting quickly. Integrating simple practices like searching before answering a question, adding what you learn and improving what is already in the repository do not make an organization less agile, they make updating and disseminating new knowledge much faster.

**Benchmarks**

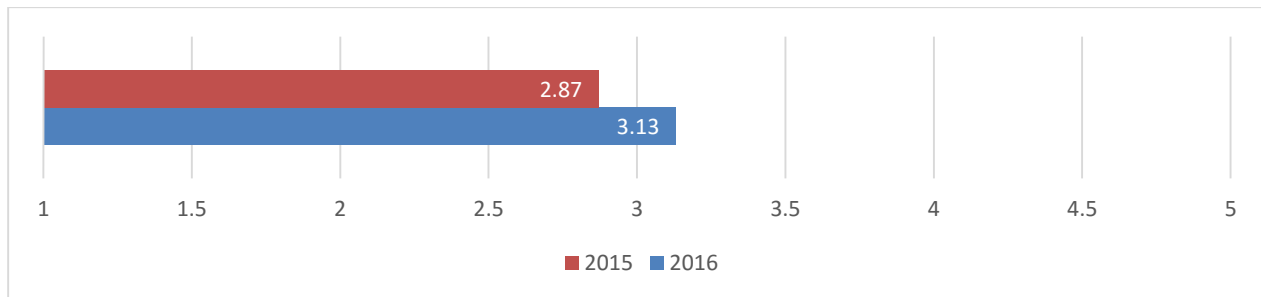


Benchmark	Score on Likert Scale – Always (5), Often, Sometimes, Rarely, Never (1)
Leadership invests as many resources in training and developing the team as in the knowledge tool	3.32/5
Leadership clearly communicates the importance of knowledge and learning	3.57/5
Knowledge sharing is embedded into how we do our work	3.43/5

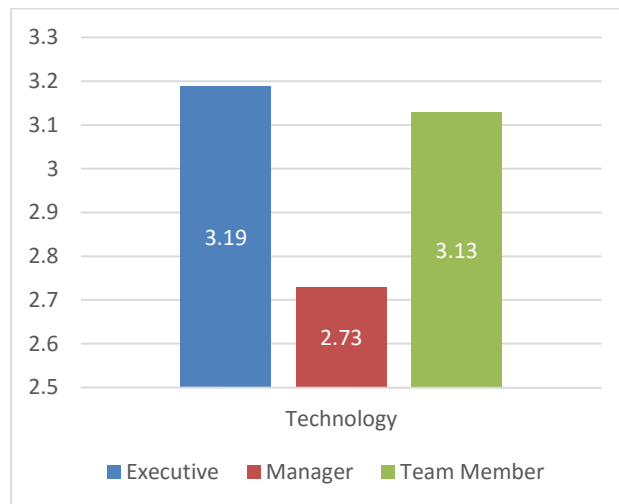
## Technology Benchmarks

In one of the most surprising changes from last year's benchmark survey, the perceptions of knowledge technology solutions are improving. Last year, both technology benchmarks were ranked last by respondents. In this group of respondents, the two benchmarks were low, but not the lowest. This does not mean that knowledge-sharing technologies are seen as seamlessly enhancing the support process, but that perceptions are becoming more favorable. It does mean that organizations are recognizing that other areas are negatively impacting their knowledge programs as much or more than the tools.

### Technology average



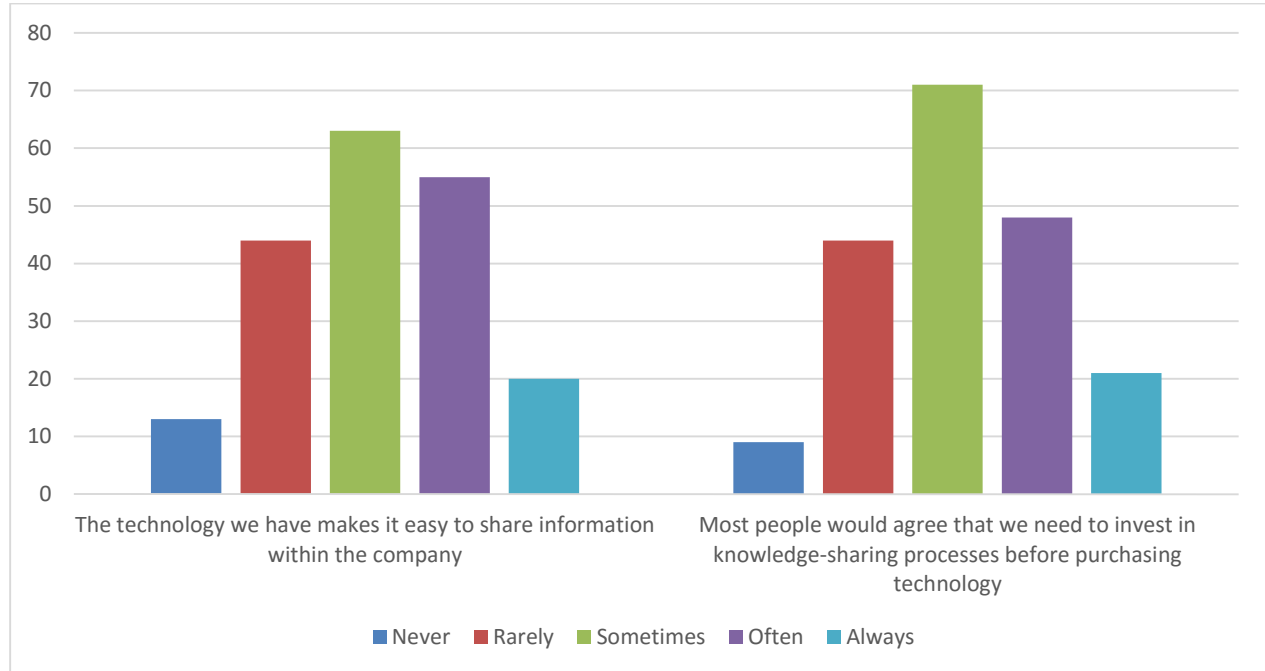
The perceptions of technology vary, however, when seen by role. Managers rate the knowledge-sharing technology lower than either of the other two sets of stakeholders.



There are two potential explanations for this divergence. First, and potentially a major issue for support organizations, this ranking indicates the relatively high priority assigned to technology by managers. When stack-ranking the individual benchmark questions, executives and team members single out questions about culture and process (e.g., alignment and behaviors) as the areas where the team needs to focus and where it excels. Again this year just as last, managers continue to single out technology as the lowest benchmark, a significant outlier in the data.

The other explanation probably also factors into the low ratings for technology by managers. Managers' functional needs for tools are very different for front-line team members. As knowledge solutions are being re-architected to make them better fit the needs of the front-line, they are not always fulfilling the needs of the managers. Historically, managers have complained about the difficulty in getting the data they want out of knowledge systems. This low impression of technology could be a current (or potentially lagging) perception of the usefulness of these tools **for managers**.

**Benchmarks**



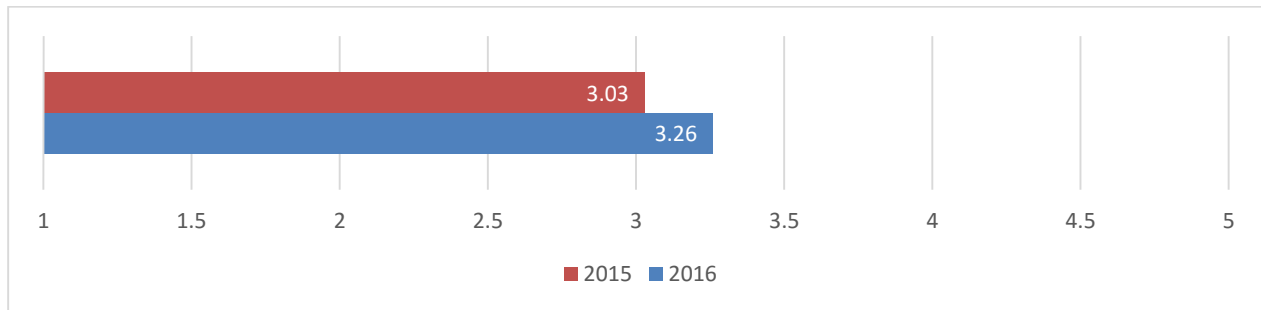
Benchmark	Score on Likert Scale – Always (5), Often, Sometimes, Rarely, Never (1)
The technology we have makes it easy to share information within the company	3.12/5
Most people would agree that we need to invest in knowledge-sharing processes before purchasing technology	3.14/5



## Culture Benchmarks

The five benchmarks in the culture area rank second lowest, only slightly higher than the technology benchmarks. These culture benchmarks provide insight into the “unofficial” practices of the support organization and whether they support knowledge sharing.

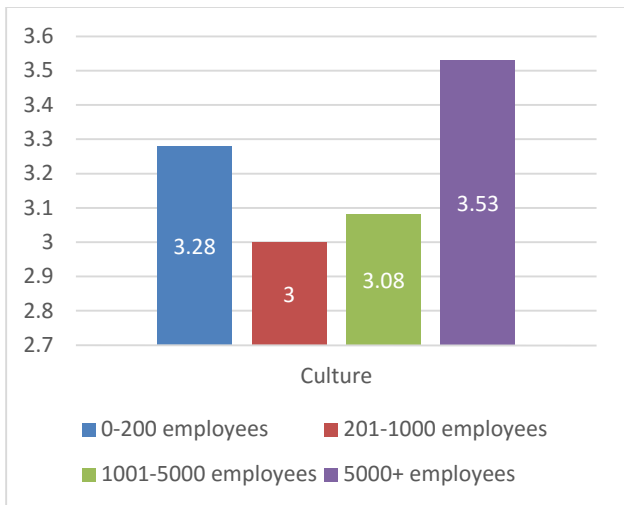
### Culture average



The most noteworthy finding is that the lowest benchmark overall is in the culture area (the only benchmark this year to rate below a 3 out of 5 on our Likert scale). Only 32% of respondents said that they always or often invest as much time in fixing the root causes of the fires as they do in fighting fires. This disconnect remains the same as last year. In times of stress, organizations tend not to follow their processes, but to revert to their underlying culture. Organizations recognize that there are still times where their culture does not support knowledge-sharing practices, even though their formal processes do.

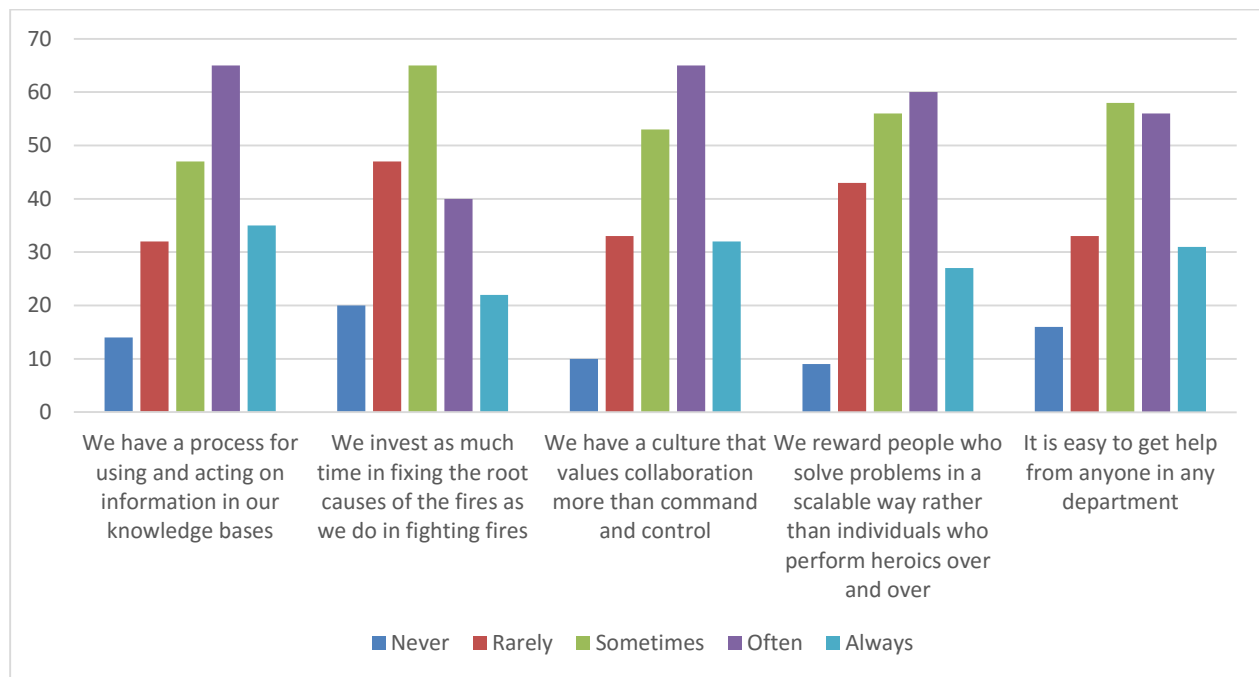
Team members, operational managers and executives must focus on these behaviors, as they potentially could pose a long-term challenge to knowledge-sharing practices. In actuality, we have seen organizations where sharing knowledge can be situationally “put on hold,” which has led to less and less engagement in the practices themselves. In addition, organizations lose an important tool in surfacing underlying causes and proactively helping customers when they do not document and share information about customer challenges as they are happening.

Like last year's survey, large organizations rate their culture higher than medium-sized organizations.



There is a noticeable dip in perception of whether there is alignment between an organization’s culture and knowledge-sharing practices in medium-sized organizations. In practice, support teams in these growing organizations can retain a relatively informal approach to knowledge-sharing based primarily on relationships (who knows what), but start to scale to customer demand where this approach is no longer successful.

**Benchmarks**

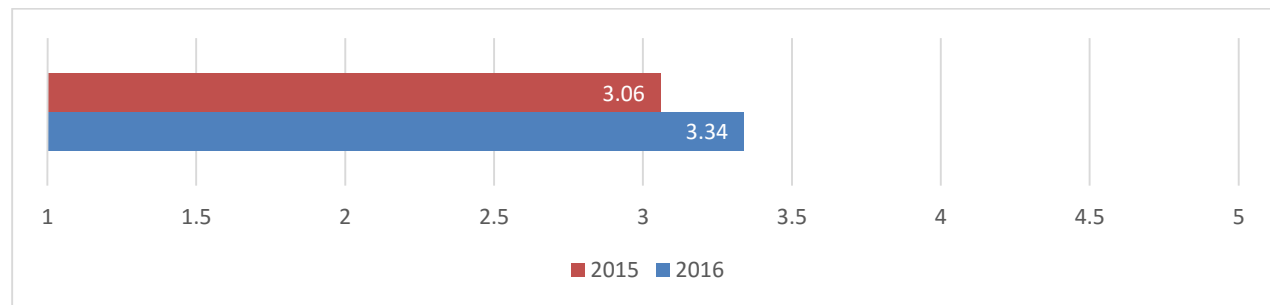


Benchmark	Score on Likert Scale – Always (5), Often, Sometimes, Rarely, Never (1)
We have a process for using and acting on information in our knowledge bases	3.38/5
We invest as much time in fixing the root causes of the fires as we do in fighting fires	2.98/5
We have a culture that values collaboration more than command and control	3.39/5
We reward people who solve problems in a scalable way, rather than individuals who perform heroics over and over	3.27/5
It is easy to get help from anyone in any department	3.27/5

## People and Leadership Benchmarks

People and leadership benchmarks provide insight into whether the organization is explicitly promoting knowledge through learning programs and if the efforts are creating a positive environment for team members.

### People and leadership average



This area was rated second-highest by respondents. Fifty-four percent of respondents said that always or often employees recommend their workplace to colleagues or friends. Executives, like last year, ranked one of these benchmarks the highest. This year, they ranked “Employees routinely recommend to their professional colleagues that our company is a good place to work” highest. Managers also ranked one of these benchmarks highest: “We have easy access to lessons learned by others in the same organization”.

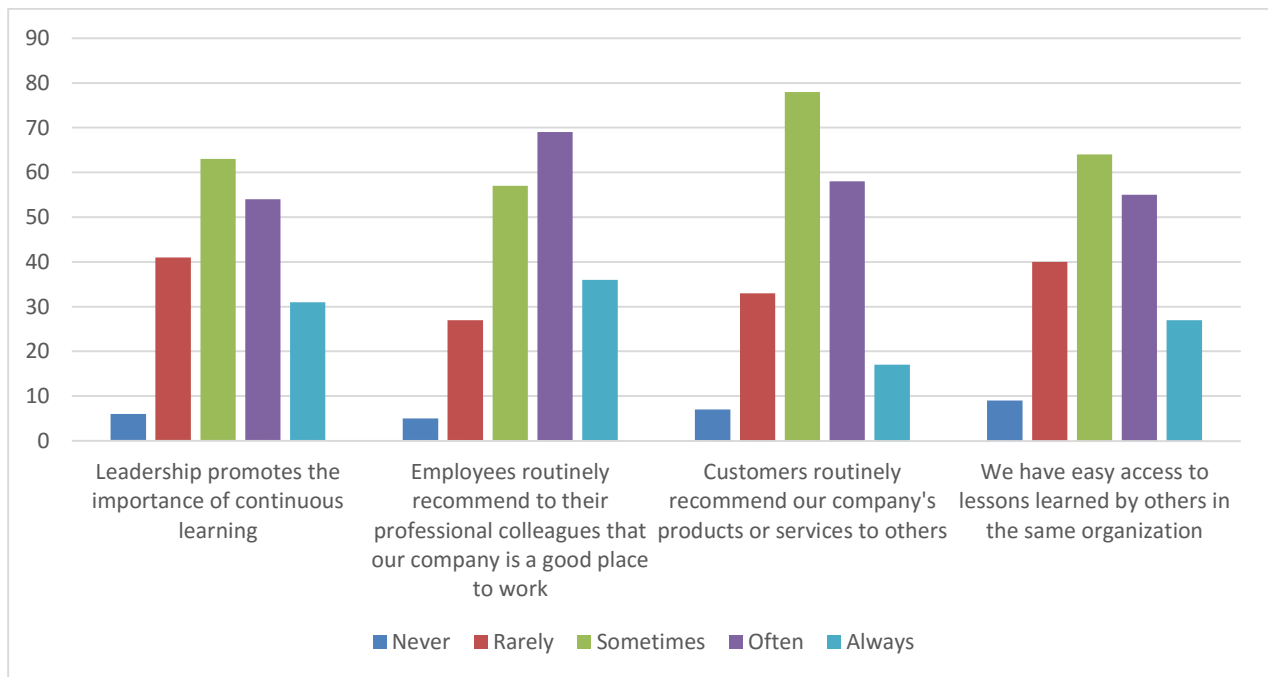
On another positive note, there is significant improvement in the perceptions of the executive’s role in promoting learning as a key component of a knowledge-sharing work environment. From last year, the respondents scored this benchmark .37 higher than the previous year, an 18% improvement.

When comparing perceptions of the environment and leadership across different-sized organizations, the same pattern of high degrees of satisfaction with the alignment of people/leadership and knowledge-sharing practices in the smallest and largest organizations. The fast growth experienced by organizations in the middle represents a significant challenge to sustaining knowledge-sharing practices. One of the greatest organizational struggles is moving beyond the easy knowledge-sharing culture of a small team to one where that knowledge needs to be put into a place where it can be accessed by many different people (often at different times and in different locations).

The data bears out that this scaling process is painful and organizations need to make knowledge-sharing practices a focus as they grow. But, as this report pointed out earlier, adopting knowledge-sharing practices does not require heavy, bureaucratic processes, but is the integration of several behaviors – finding, using, enhancing and creating knowledge – at every opportunity.



**Benchmarks**



Benchmark	Score on Likert Scale – Always (5), Often, Sometimes, Rarely, Never (1)
Leadership promotes the importance of continuous learning	3.32/5
Employees routinely recommend to their professional colleagues that your organization is a good place to work	3.54/5
Customers routinely recommend our company's products or services to others	3.23/5
We have easy access to lessons learned by others in the organization	3.26/5

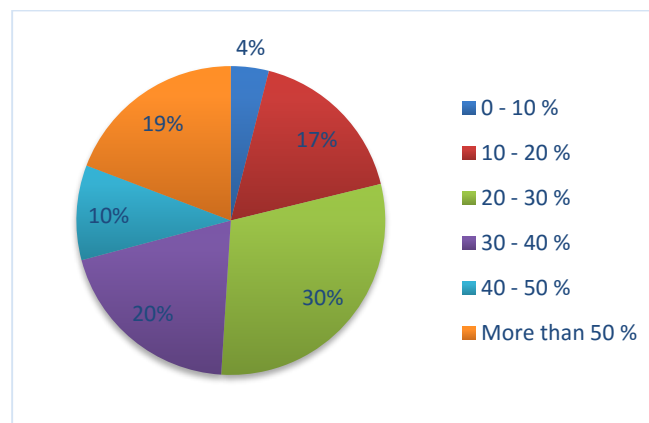
## A Final Note

*Processes and communications are critical to successful knowledge management, but deeply ingrained behaviors can still slip through at times of stress.*

As the findings illustrated last year, the state of knowledge sharing in 2016 is not bleak. Not only have organizations embraced knowledge-sharing practices into their day-to-day work, executives are consistently emphasizing the importance of these practices to their organizations. The improved perception of the tools for knowledge sharing also demonstrates progress. Hopefully, this trend will continue as organizations stop scapegoating tools and embrace the leadership, culture, and processes required to sustain healthy knowledge sharing in a support organization.

Two points bear mentioned. First, the results of this benchmarking report reinforce the conclusions from last year, that organizations are increasingly embracing knowledge-sharing practices. This means that only lagging organizations are totally ignoring opportunities to share knowledge. Anecdotally, we are hearing that these organizations are starting to lose team members to support teams that do embrace knowledge sharing.

Respondents see that there is much more work to be done. One of the final questions in the survey was "If people in your workplace were sharing knowledge as well as they possibly could, it would improve productivity by:" Nearly 50% of respondents believe that their organization could be at least 30% more productive if they shared knowledge better.



Only 4% of respondents believe that they are effectively sharing knowledge (within 10%). There is much more to be done.

### How organizations must evolve

There are three specific courses of action that organizations can take to address some of the critical challenges identified in this benchmark report.

### 1. **Attack the middle.**

Middle managers remain a gap in support organizations' implementation of knowledge sharing. Many of them are well-intentioned, but find themselves pulled into fighting the fires along with their team members. Executives need to help managers understand how the behaviors of the front line – particularly the effective sharing of knowledge – can drive organizational outcomes that the executive cares about. Managers also need to engage in knowledge sharing so they understand how these practices contribute to an exceptional support experience.

### 2. **Root out old behaviors and the measures behind them.**

One of the greatest challenges to implementing or sustaining a knowledge-sharing program is bridging the gap between a team's culture and knowledge practices, particularly those behaviors that emerge in times of organizational stress. There are nearly always two roots of a culture/process mismatch. The first is "the way we have always done things here." If this is truly the only challenge, then attention by managers and repetition will resolve the issue. Many times, however, there are measures that (directly or indirectly) support the "old" culture and its behaviors. These must be identified and dropped in favor of measures that reinforce knowledge-sharing practices, not undermine them.

### 3. **Be careful as you scale.**

Small organizations are often the most effective sharers of knowledge (they do not always **formalize** that knowledge transfer, but that is a different issue). As these small organizations grow, they find the way they shared knowledge before less and less effective. Fast-growing organizations often have a very difficult road to travel, as they want to capture and reuse knowledge effectively, but do not want to compromise the open and informal culture that led to their initial success. Maintaining this balance is very difficult and often leads to several pendulum swings toward greater process and away from it. Effective knowledge sharing is becoming almost a precondition for effectively scaling a support team. Executives in these growing organizations should recommit time and resources to learning about and incorporating knowledge-sharing practices.

Effectively sharing knowledge is no longer a competitive advantage,  
knowledge sharing is now a requirement.

## About the Authors



Dr. Adam Krob, Klever CIO and Co-founder. Adam constantly looks for ways to make knowledge sharing simpler. He came to Klever from the Verghis Group, where he helped companies around the world with their knowledge sharing programs. He has a MA and PhD in political science from Duke University, and an MBA from Tulane University. Adam lives in New Orleans, LA.



Philip Verghis, Klever CEO and Co-founder. Phil has won numerous awards for knowledge sharing since the early 1990s. As VP of Infrastructure & Support at Akamai Technologies, he founded the Customer Support team and ran the global Network (15,000 servers), Operations (66 countries) and IT teams during a time of massive growth and profitability, and during the dot com crash. During his time Akamai went from \$0 in revenue in 1999 to over \$200M in revenue in Q1 2004.

Prior to Klever, he was a trusted advisor to service and support executives around the world with The Verghis Group.