



WORKING METHODS  
FOR KNOWLEDGE  
MANAGEMENT

LEARNING  
ORGANIZATIONS

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# Learning Organizations

# **WORKING METHODS FOR KNOWLEDGE MANAGEMENT**

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# Learning Organizations

BY

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# **Introduction to the Series – Working Methods in Knowledge Management**

Knowledge sciences as a discipline has a rich and diverse history dating back to the 1950s. In the past 70 years, the discipline has drawn theory and practice from economics, engineering, communications, learning sciences, technology, information sciences, psychology, social sciences, and business and organization management. To craft this discipline, we have developed our own language and terminologies, established our own peer-reviewed journals and built a rich research foundation, created a gray literature, and established a series of networks and conferences. Over the decades, there have been many knowledge management education programs, but there is no consistent curriculum and few have sustained. It has been challenging for new practitioners to gain an understanding of the field. And, while the practice of knowledge management is growing around the world, it has not yet achieved the expected organizational stature. For knowledge management to rise to the stature of other business functions and operations, it must be able to speak the language of business, align with, and support the way the organization works.

This series is designed for business and knowledge management practitioners. Working Methods in Knowledge Management is a multiyear and multivolume series designed to address each and all of the methods required to establish and sustain an organization-wide knowledge management function. The goal of the series is to provide a business perspective of each topic. Each book begins by grounding the method in the business context – then translates established business models and methods to a knowledge management context. It is often the case that this translation expands and extends the business model and method.

The knowledge management literature is rich with introductory handbooks, guidebooks, cookbooks, toolkits, and practical introductions. This literature is an important starting point for anyone new to the discipline. We recommend any and all of these books as a way to build a fundamental understanding of the scope and coverage of the field. These texts will provide a good 10–20 -pages introduction to all of the key issues you need to be aware of as you embark on a new career in the field or have been assigned a new knowledge management role or responsibility. Once you have that grounding, though, we recommend that you look to the Working Methods in Knowledge Management texts as an intermediate source for understanding “What comes next? What now?”

Just as this series is not intended as a starting point for the field, neither is it an ending point. Each text is designed to support practical application and to foster a broader discussion of practice. It is through practical application and extended discussion that we will advance theory and research. The editors anticipate that as practice expands, there will be a need to update the texts – based on what we are learning. Furthermore, the editors hope the texts are written in a way that allows business managers to extend their work to include knowledge management functions and assets. We will learn most from expanding the discussion beyond our core community.

## **Joint Enterprise, Mutual Engagement, and a Shared Repertoire**

From the outset, the publisher and the editors have established a new and different approach to designing and writing the books. Each text is supported by a team of authors who represent multiple and diverse views of the topic. Each team includes academics, practitioners, and thought leaders. Every author has grappled with the topic in a real-world context. Every author sees the topic differently today than they did when the project began. Over the course of several months, through weekly virtual discussions, the scope and coverage were defined. Through mutual engagement and open sharing, each team developed a joint enterprise and commitment to the topic that is enduring. Every author learned through the discussion and writing process. Each project has resulted in a new shared repertoire. We practiced knowledge management to write about knowledge management. We “ate our own dog food.”

## **Acknowledgments of Early Support**

The series is a massive effort. If there is value in the series much of the credit must go to two individuals – Dr Elias Carayannis, George Washington University, and Dr Manlio Del Giudice, University of Rome. It was Dr Carayannis who first encouraged us to develop a proposal for Emerald Publishers. Of course, this encouragement was just the most recent form of support from Dr Carayannis. He has been a mentor and coach for close to 20 years. It was Dr Carayannis who first taught me the importance of aligning knowledge management with business administration and organizational management. Dr Del Giudice has been generous with his guidance – particularly in setting a high standard for any and all knowledge management research and practice. We are grateful to him for his careful review and critique of our initial proposal. His patience and thoughtful coaching of colleagues are rare in any field. The field will reach its full potential as long as we have teachers and editors like Dr Del Giudice.

# Preface

## Overview of the Subject Matter

Learning is a topic that is endemic to human growth and development. Historically, learning has been framed as a formal activity associated with traditional, institutionalized education. The traditional view and treatment of learning have evolved over centuries – with the general trend line being to extend formal learning to a greater percentage of the population. Formal and institutionalized education was an important criterion for success in the industrial economy. Education credentials were the keys that provided access to work with the highest status and financial rewards. As the economy has transitioned to a knowledge economy, though, our understanding and treatment of learning have expanded. The human attributes and characteristics that are important to individuals and organizations today have expanded beyond educational credentials. The knowledge that is important for success today extends well beyond what can be credentialed, certified, standardized, and institutionalized. As the type of knowledge we value has expanded, so must the methods by which we develop and learn that knowledge.

In 2021, learning is multidimensional and multifaceted. It includes tacit knowledge and certified skills and competencies but extends well beyond those types of knowledge to include a rich set of human, structural, and relational capital attributes and assets. Learning is a part of our everyday life, especially in the workplace. Learning happens all day in many different contexts – when and where we learn is as important as what we learn. The dynamic nature of the knowledge economy means that what we need to learn is continually changing. Learning is now expected to occur over a lifetime.

These new developments challenge our fundamental theories of education and learning – the fields of education, psychology, knowledge sciences, organizational management, and economics are rethinking what learning means, how to integrate it into our organizational structures and designs, and how to ensure that there is widespread access to and opportunities for every individual to learn.

## Where the Topic Fits in the World Today

When the authors began discussions for this text, learning, and organizational learning, in particular, was a topic of growing concern to businesses and organizations. There were important examples of high-profile public- and private-sector organizations that have designed and implemented new learning strategies.

In 2020, these organizations were at the forefront – with most organizations still focused on traditional approaches to training. Traditional training has focused on ensuring that an organization maintains skills and competencies to support its competitive market position. Traditionally, such training has focused on core business capabilities.

In 2021, there are several trends that are shaping how we think about learning and how we design learning strategies. The rapid pace of growth of the knowledge economy has highlighted learning as the core engine of organizational capital investment and growth. Workforce planning has shifted from a traditional “job focus” to a more comprehensive characterization of human attributes that support creativity, innovation, collaboration, and agility. Rather than hiring and firing for a specific operation, human resource professionals now look at an individual’s potential growth over a lifetime. Individuals are now willing to work in many different environments over a lifetime. Whether we chose to work for an organization now depends on the organization’s reputation, the opportunity for personal growth, and the organization’s working culture. The world of virtual work now expands the landscape of organizations we might work for – regardless of where they are located. All of these trends were well underway in 2020, when the authors began work on this text.

As we write this book, we are in the midst of a worldwide pandemic. Our work environment and our learning environment have shifted dramatically. Those trends that were emerging prior to 2020 have now accelerated to define our new world. The range of knowledge attributes we need to thrive in this new world has expanded. Our personalities and our individual ways of working are now on full display – from the highest-level CEO to the entry-level team member. How well we can work with others – in a constantly changing environment – is clear to others. Relational capital – whom we know and whom we can talk to – has broken down the traditional “levels.” And, we are learning more about each other’s living and cultural backgrounds – because we are all now “in our native environments” rather than the organization’s prescribed physical structure. We do everything from these “home environments” – most learning takes place in that context. Learning has now gone virtual.

While the core focus of this text has remained constant – to provide business managers with sufficient treatment of the issues to design a suitable and reasonable organizational learning strategy – the factors and considerations have expanded. Our original intent was to provide a framework that managers could use to design those strategies. In fact, the past year has given us many opportunities to test and validate our framework. The role and nature of learning will continue to evolve in the future.

## **Where the Book Fits in the Literature Today**

This is the seventh book in the Working Methods in Knowledge Management series. This book builds on the treatment of the knowledge economy, knowledge capital, knowledge capabilities, and competencies, and assessment offered in the 2019 titles.

The rapid development and growth of the knowledge economy have expanded the interest in learning beyond its traditional home in the field of education science. The topics of education, psychology, economics, business administration, and human resource management are central to learning in the twenty-first century. While there is a rich literature on learning in each of these disciplines, the literature is fragmented and scattered across several domains. The authors hope to bridge these gaps, create a cross-disciplinary discourse, and expose gaps in research into organizational learning strategies. This text sits at the intersection of all these disciplines but integrates the essential concepts of each as they relate to learning as a new way of working and thinking.

We draw our fundamental theories of learning and education from educational sciences. In particular, two subdisciplines of education – learning psychology and human development – have generated what we know about how we learn today. These theories are so important that the authors have devoted a full chapter to reviewing this literature. From the researchers in this discipline, we have theories of cognition, fundamental teaching and learning models and theories, and instructional design models and strategies. These subfields also draw heavily from psychology and from neural sciences. Perhaps more than any other field, though, education provides important theoretical and applied research into the assessment.

What does the field of economics contribute to our understanding of learning? This discipline offers two perspectives on learning. The first pertains to the role that information and knowledge play in reducing the uncertainty and risk of economic transactions. The second pertains to the recent, emerging characterization of knowledge as intellectual capital. From the mid-to-late twentieth century, economists modeled and valued information for the role it played in increasing the certainty with which we made the economic choice. The higher the quality of information and the more information available, the better the economic outcome. Learning was an indirect contribution to economic outcomes. This perspective continues to be important to economists in the knowledge economy. Economists have also advanced the discussion of knowledge markets and knowledge transactions. This is a logical extension of modeling the role that information and knowledge play in markets generally. A second perspective emerged, though, at the end of the twentieth century with the new subdiscipline of economics focused on intellectual capital management. This new perspective emerged at the intersection of accounting, asset management, and economics. Several intellectual capital models emerged. As the knowledge economy has advanced, organizations have been challenged to assign value to their stocks of knowledge (i.e., intellectual) capital assets. In the past 20 years, these models have coalesced around three important categories – human capital, structural capital, and relational capital. This Emerald series builds upon the good work of leading intellectual capital researchers.

How do organizational management researchers and practitioners view learning? Learning is a relatively new but important one in this literature. The perspective that is important is that of collective and organizational learning. In the past 10 years, some leading and forward-looking organizations have realized that in order to survive in dynamic business environments, organizations need to continually adapt and adjust. On a practical level, this means



shifting from rigid administrative structures to agile working groups and problem-focused teams. Being agile and problem-focused requires new forms of knowledge capital at all levels of the organization. It means shifting from the task-level business process view to business capabilities. Learning is the process that creates these essential organizational characteristics. These researchers and practitioners have realized that such learning happens in the context and on the job – learning is now a new business capability. Learning at the organizational level contributes to learning organizations. In a knowledge economy, current and potential employees want to work at organizations that grow and offer growth opportunities. Being a learning organization is now an important external brand. Current and potential employees want to work where there is a learning culture that gives them the opportunity to learn and grow every day, in any environment. The learning organization rewards its employees for their potential as well as current contributions and credentials.

Traditionally, human resource professionals have been the voice of learning and training in our organizations. The human resource profession grew out of increasingly complex work environments, increased specializations, and rapidly expanding professions. These professionals designed our job profiles and classifications and developed the concept of work-related competencies. They have been the primary connection between our sources of education and learning and staffing. In the past 10 years, these professionals have shifted their view from job profiles and classification to team composition and complementarities. The work of human resource professionals is shifting from staffing existing positions and vacancies to envisioning the future workforce. The authors have drawn from the current literature of this discipline to speak to “business-relevant” learning.

## **The Intended Audience for this Book**

This text is written for organizational executives who are experiencing and need to design new ways of learning and to invest in their business to thrive in a knowledge economy. The book is written for business managers who must ensure that their employees are learning and growing to support the changing environment, that the day-to-day culture affords opportunities for learning, and to create a culture where employees chose to stay. The book is written for human resource and personnel management professionals and practitioners who are tasked with transitioning from a traditional training environment to a more comprehensive and inclusive learning environment. The book is written for human resource managers who are charged with envisioning and planning for the workforce of the future, working with the available human capital. The book is written for economists who are struggling to redefine what capital investment and growth means in the knowledge economy. The book is written for knowledge management professionals and practitioners who need to focus on the future and to connect their tactics and activities to the bigger picture. Finally, the book is written for workers who are struggling to understand how to prepare for and adapt to the new world of work and learning.

## **Structure of the Book**

The book is organized into three sections and 10 chapters. Section 1 is comprised of four chapters and introduces the reader to the basic characterization and role of learning in the knowledge economy. Section 2 is comprised of three chapters. This section provides an application of a learning framework to three important levels, including at the organization, the team, and the individual level. Section 3 is comprised of three chapters. This section considers how the reader might leverage what was learned in Sections 1 and 2 to developing suitable and reasonable strategies for their organizations. This section also provides guidance for communicating and maintaining these strategies into the future.

### Section 1. Learning in the Knowledge Economy

- Chapter 1. Knowledge Capital and the Knowledge Economy
- Chapter 2. Learning
- Chapter 3. Learning Cultures
- Chapter 4. Designs for Learning

### Section 2. Learning Environments

- Chapter 5. Learning at the Organization Level
- Chapter 6. Learning at the Team or Group Level
- Chapter 7. Learning at the Individual Level

### Section 3. Developing Learning Strategies

- Chapter 8: Designing and Developing an Organization-wide Learning Strategy
- Chapter 9. Communicating and Socializing the Learning Strategy
- Chapter 10. Maintaining and Sustaining a Learning Strategy

## **Chapter Summaries**

The summaries of all 10 chapters are provided in the following. The reader will also find extensive references to literature from thought leaders and practitioners in that topic.

Chapter 1 describes the role of knowledge as the primary factor of production in a knowledge economy. Knowledge is the critical capital asset in the knowledge economy. Because the economic properties and behaviors of knowledge are different from financial and physical capital, the authors explain the need to rethink how we see economic transactions and how we think about capital investment and development. Learning is the primary investment activity in knowledge capital. Each type of knowledge capital is different, though, and requires a distinct learning strategy.

Chapter 2 explains traditional learning theories. Learning is the primary investment strategy for the knowledge economy. There is a rich literature – theoretical and applied – focused on learning. This chapter provides a high-level review of

various theories of learning as described in behavioral and cognitive theories. This chapter translates the theory to the knowledge economy and explains how these theoretical concepts can be applied in the future knowledge workplace. The chapter also considers how individuals learn. Finally, the chapter explains how organizations can utilize theory to enhance the learning in the workplace of employees.

Chapter 3 defines culture and explains the different conceptual models developed by key researchers in the field. The authors explain why it is essential for us to learn how to see our cultures. The chapter breaks the conceptual models down into three essential elements, including assumptions and beliefs, values and behaviors, and artifacts. The authors explain why and how each organization's culture is unique, and walk through the factors that influence our organizational cultures. The chapter reminds us that it is hard to deliberately change an organization's culture because it is inherently dynamic. Each organization should strive to understand how these factors affect our organizations.

Chapter 4 introduces a comprehensive framework for designing a learning organization. While some organizations have begun the process of redesigning for learning, most continue to follow a traditional, formal education model. The authors consider the changing work environment of the knowledge economy and explain why it is important to rethink all aspects of learning. The comprehensive framework covers why we learn, who is learning, what they are learning, where and when they are learning, and whom they are learning from and with. The authors suggest that every organization's learning design must be suitable to its business goals and reasonable in terms of the resources available.

Chapter 5 focuses on the practical aspects of building learning capacity at the organization level. The authors define and distinguish learning organizations, learning at the organizational level, and organizational learning. The chapter defines organizational learning as the capacity for the organization – individually and collectively – to behave intelligently (syntropy) and to avoid behaving unintelligently (entropy). The chapter describes opportunities an organization can take to expand organizational learning through partnerships and sponsorships.

Chapter 6 focuses on learning at the team level. Teams and their performance are key for the ability of individuals and the organization to take effective action in uncertain, complex, or changing conditions. A collective culture that values the knowledge of all employees leads individuals to seek and use the knowledge of others, driving team, and organizational learning. The attitudes and beliefs of individuals and the workforce become as important as their skills and competencies for the success of the business strategy and its operations. Team or group learning helps capture effective procedural knowledge and diffuse it across the organization, which increases self-esteem and cost-effectiveness within the business. Team learning helps with new and extended knowledge networks, facilitating collaboration between individuals and with non-human actors for the benefit of the business.

Chapter 7 focuses on the role that individual learning plays in the learning capacity of a knowledge organization. The authors defined individual learning and considered how learning styles and factors should be considered in designing a new learning environment. This chapter also explains how individual learning fits into both the collective learning capacity of the organization and the overall

learning capacity of the organization. The chapter also highlights the importance of developing individual learning strategies and plans for each individual at every level and in every organizational unit.

Chapter 8 provides the reader with guidance and advice to develop a learning strategy for their organization. While all organizations can leverage learning theory, common definitions of knowledge capital, and work from common elements of a learning culture, each organization requires its own learning strategy. And, each organization must continually manage and renew that strategy to reflect the changing external and internal business environment. This chapter considers how to craft a strategy that is suited to a dynamic and often turbulent environment. A dynamic learning strategy – aligned with the dynamic business strategy – is essential for the adaptability and transformation that operating in such a dynamic context may require. Adaptability, innovation, and transformation require an ongoing process of knowledge capacity building and reassessment.

Chapter 9 considers how to leverage communications capabilities to support each component of the learning strategy. The promotion of a learning organization's reputation and image may benefit from public relations support. Strategic communications practices are well suited to promoting the organizational-level learning strategy. Group-level learning strategies and individual learning plans can be effectively supported by internal communication methods and practices. Finally, the most effective support strategy could be simple socialization through everyday learning conversations and communications among employees.

Chapter 10 explains how organizations might ensure that their learning strategies remain relevant, reasonable, and valuable to the organization. The authors explore what it means to keep the learning strategy alive at all levels of the organization. Keeping the learning strategy relevant means continuously reviewing the state of the external business environment, assessing the current stock of knowledge capital, defining the gaps, and updating all levels of the strategy to fill those gaps. Maintaining and sustaining the learning strategy is a significant collaborative and coordinated effort. Sustaining the learning strategy means treating learning as an essential business capability, with reviews and assessments. It means adapting the learning strategy to reflect changes in the business vision, mission, and strategies. It means continual investments in and nourishment of the learning culture.

## **How this Book Impacts the Field**

The authors hope the book will contribute to the literature of business and management by shifting the discourse about learning as a capital investment strategy rather than as a traditional training strategy. In some ways, this book represents a return to the early twentieth century when individuals learned from many formal and informal sources in their communities. In other ways, it is a radically new treatment of these topics because it requires more intentional and deliberate planning at the individual level. Individuals can no longer rely on organizations they work with to tell them what they need to learn to survive in the knowledge economy. It represents a democratization of learning across society to ensure that learning opportunities are available and accessible to everyone. Learning is the

engine that drives the knowledge economy. Learning is what builds knowledge capital. Knowledge capital is what determines the state of any local, regional, or national economy.

The book considers how organizations might approach the development of learning strategies for each individual, for groups, and for the organization as a whole. The book recognizes that learning strategies are negotiated between individuals and organizations – to achieve value for both. Finally, the book considers how to “right-size” and “best fit” a learning strategy to support an organization’s business goals – at a given point in time, in a given market, and at a given level of resources. The text emphasizes the importance of aligning business, knowledge stocks, and learning strategies.

The authors hope the book will contribute to the field of human resource management by increasing the visibility of learning and the importance of knowledge capital. The expectation is that the book will highlight the value of knowledge capital to both individuals and organizations. The focus on organizational learning is a new opportunity for both human resources and the business to engage in building new learning capacity. Hopefully, the book expands the discourse between economists, knowledge scientists, and human resource professionals on how each can contribute to designing a workplace of the future. A cross-discipline dialog will draw upon the best of each and create a richer understanding for the future.

## **Note from the Authors**

The authors have collaborated on this text during a period of significant change. Each of our countries went into COVID-19 lockdown just as the team came together to define the scope and coverage of the book. The issues we had chosen to address were issues we all experienced firsthand. Our working environments changed from rich in-person physical interactions – at a local and international level – to sequential virtual activities. Rather than serendipitous conversations and communications, our worlds became more deliberate, intentional, and scripted. We were forced to redesign kinds of events that had become commonplace (e.g., conferences, office hours and meetings, hallway conversations, brainstorming around a whiteboard, happy hours, and collegial dinners) to something entirely new.

Our work and home environments have blended. Becoming more virtual has opened our homes to our coworkers. Where work-related learning happens is now – by definition – at and from home. When learning happens is now whenever we have the time. Everyone has now become a part-time teacher as our families’ learning is now based at home. Our cultures shifted significantly, as did our communications structures and channels. Some of our fundamental assumptions and beliefs were exposed to greater scrutiny, and we were given new opportunities to “see” and compare our values. Throughout the past year, these changes have reinforced our view of the essential role that learning plays in our everyday work environments. The COVID-19 pandemic has caused us to be more creative, thoughtful, and inventive about why, what, when, where, how we learn, and whom we learn from. We hope that the way we have framed this topic has value as we all navigate this.