

Executive Summary

Personal Knowledge Management shares the best intentions of Knowledge Management principles, but applies the lessons of KM's shortcomings. KM's inflexible, top-down strategy poses too many obstacles, and all too often undermines the successes of expensive, large-scale initiatives. PKM's more flexible and personalized bottom-up approach focuses on the individual knowledge worker, not the business enterprise as a whole, to achieve valuable personal benefits and a competitive business edge.

Knowledge Management: A Brief Historical Perspective

The concept of Personal Knowledge Management has evolved from its predecessor of almost the same name. The term “Knowledge Management” is widely attributed to renowned management specialist and author Peter Drucker, who coined it during mid-1980s in the context of an economy shifting from an industrial model to a more knowledge-based one. The years since have seen many significant technological advances, not the least of which has been global adoption of the World Wide Web as an information-sharing medium. In the modern so-called Information Age, characterized by an abundant supply of cheaply distributed yet inconsistently substantiated information sources, much has been written about the virtues of Knowledge Management (KM) principles. With a corporation’s competitive edge increasingly determined by its ability to streamline costs and innovate new ideas, it has become a business imperative to leverage the organization’s internal collective knowledge.

KM recognizes that what begins as data (the most plentiful and least immediately comprehensible resource) can, with increasing amounts of human context and assimilation, be promoted to the status of information, then knowledge, then (rarest and most coveted of all) wisdom. The layers of meaning applied to each level of this “information pyramid” result from distinctly human intervention -- individuals making sense of the *infoglut* to produce valuable *intellectual capital*. From this comes the contemporary notion of the “knowledge worker”, professionals now challenged with a work environment that demands increasingly complex information processing skills and an ever-broadening knowledge domain. KM acknowledges, on the one hand, the increasing value of such skilled individuals to the organizations they serve and, on the other, the high cost of losing them (and therefore their knowledge) – at the end of the work day, or worse, permanently. A KM initiative typically asks: *What technologies would foster an environment that captures, archives and distributes our collective internal knowledge?* Popular KM themes include: quick and easy information access and retrieval, less redundant work (“reinventing the wheel”), and delivering the right information to the right people at the right time.

Despite best intentions, roadblocks to the successful practice of Knowledge Management are considerable. Few incentives or corporate mandates can overcome the fact that individuals have legitimate reasons for not sharing what they know (“knowledge = power”). Enterprise-wide KM initiatives have generally required that knowledge workers agree upon and adopt a common set of tools and technologies, that business processes be articulated and mapped to KM objectives, and that there be a unified strategy for categorizing an organization’s knowledge assets. These three objectives alone require enormous effort – particularly within larger and more established organizations, for which a successful KM strategy would recognize the most value – and yet the far more important social considerations of a KM initiative (arguably, the most difficult of all to untangle) go largely unaddressed. The result? Today, Knowledge Management is largely regarded as yet another expensive corporate fad.

So what is “Personal Knowledge Management”, and what new does it have to offer?

Personal Knowledge Management: an Alternate Approach

In a very general sense, Personal Knowledge Management (PKM) maintains KM’s best intentions, but acknowledges and improves upon KM’s most challenging shortcomings. Whereas KM seeks to retain a collective body of organizational knowledge through a process of documentation, codification, archiving and reuse, PKM seeks to encourage an individual’s knowledge expansion and development, using whatever tools and techniques best

suit each worker. Whereas a KM strategy is implemented as a top-down, enterprise-wide solution that requires universal consensus and full adoption across all knowledge workers of various disciplines, PKM offers a more flexible, bottom-up approach that responds much more quickly to change, and accommodates a spectrum of technology preferences, organization schemes, and personal habits. Whereas KM focuses primarily on benefits to the organization, and secondarily on benefits to individuals, PKM understands that the organization will reap rich rewards if the personal success of its individual workers is prioritized. The essential goals of both are the same: know what you know, pursue expertise, stay current, filter effectively, find meaning, cast a critical and discerning eye, and archive for future use or reflection.

Because an organization that advocates PKM recognizes that effective knowledge workers are just as valuable to its competitors, it is more motivated than ever to retain their services. One obvious way to discourage attrition and improve morale is to foster a professional environment in which individuals are empowered to succeed and achieve unlimited potential. Such a strategy offers clear benefits to both sides.

To distinguish PKM from KM, it's useful to compare it to network theory. If the quality of a network can be measured by the strength of each of its nodes, then the quality of a knowledge-based organization can be measured by the strength of each of its workers. PKM shifts the focus of power from the organization to the individual. A PKM strategy views the individual knowledge worker as his or her own enterprise, working within a community of others.

Expanding on this analogy, five scholars at Millikin University, writing on the topic of Personal Knowledge Management as a strategy applied to the undergraduate academic experience (Avery, Brooks, Brown, Dorsey, O'Connor), explain: "Just as a well-functioning electronic network depends on well-managed individual nodes that are connected to the network, so does community knowledge depend on well-developed individual contributors." They note that the "personal" in PKM does not equate to "private" or "the opposite of public," but rather alludes to a balance of private and public, personal and professional. This balance is evident in their seven defined skills of PKM: (1) retrieving information; (2) evaluating information; (3) organizing information; (4) collaborating around information; (5) analyzing information; (6) presenting information; (7) securing information.

An essential quality of PKM – one that clearly distinguishes it from KM – is the degree to which it embraces the notion of a "knowledge workbench". While traditional KM is most concerned with codifying and preserving the knowledge of humans for archival purposes, PKM appreciates that knowledge is best cultivated through deeper human understanding and ongoing, iterative reflection. A PKM strategy encourages individual knowledge workers to develop and revisit ideas over time, to articulate key points and seek new meaning – either as a personally beneficial exercise, or as a social activity with others. If the product of P2P file sharing is a static archive, the product of P2P knowledge sharing is a workbench from which new ideas and meaning may emerge.

PKM Skills Increasingly Essential in a Knowledge-Based Economy

Research by Steve Whittaker and Julia Hirschberg (2001, <http://portal.acm.org/citation.cfm?doid=376929.376932>), cited by Jennifer Hyams and Abigail Sellen of HP Labs, studied the personal document archives of office workers. Typical archives reveal significant percentages of obsolete and low-value information, never-read documents, unique documents (such as notes written by the archive owner), and publicly available materials. Many documents are archived for perceived future value, but inconsistent categorization schemes result in document loss and duplicates.

When the metrics of a competitive knowledge-based economy include initiative taking, increased levels of responsibility, innovative thinking, information synthesis, deductive reasoning and assimilation, effective research abilities, and individual contributions, PKM skills offer an important edge.

Professors at Millikin University propose PKM for undergraduate students as a means of contextualizing a more integrated learning experience, as an alternative to the traditional narrow focus of a declared major. Millikin is not the only academic institution to advocate PKM principles for their students. The Anderson School at UCLA (<http://www.anderson.ucla.edu/>) developed a PKM workshop for its MBA students. Jason Frand, assistant dean and director of computing and information, and Carol Hixon, in a working paper dated December 1999, explain that

“PKM, as conceived at the Anderson School, is a conceptual framework to organize and integrate information that we, as individuals, feel is important that it becomes part of our personal knowledge base. It provides a strategy for transforming what might be random pieces of information into something that can be systematically applied and that expands our personal knowledge.” Frand and Hixon’s strategy begins with developing a mental map of working knowledge by creating an organizational structure. Once that is done, select appropriate tools and technologies to extend personal memory, facilitate continuous learning, and support general PKM activities and goals.

PKM Tools and Technologies

Perhaps the most important consideration about tools and technologies used in support of PKM activities is that the best choices are made at the individual level. There is no market for PKM products and services – perhaps partly the result of a now mostly failed KM market, but more accurately because the best categorization schemes, organization systems, and electronic devices are ones that are very personally defined and best suit an individual knowledge worker’s lifestyle and work habits.

PKM is more than simply having immediate and abundant access to information. It’s about filtering and qualifying information, finding meaning in it, adding new meaning to it, relating it to personal perspectives, and articulating it for later consumption and development (by the original thinker or others).

Journalist and KM/PKM consultant Steve Barth warns against using the terms “tools” and “technologies” interchangeably. To do so, he argues, is to disregard the personal connection we feel toward tools that deliver exceptional comfort and convenience. “I think we have overlooked the traditional, anthropological place that these typically physical objects have played in the past and how they add to our sense of comfort, identity and safety,” he states. It’s widely acknowledged that we form loyal attachments to quality tools of manual labor (e.g., a sharp kitchen knife, a well-balanced hammer). To be forced into using an inadequate tool for our needs or to be prevented from using a favorite one is a risk most KM initiatives run, and it serves no one well.

Imposing an inappropriate or an unnecessarily limited set of tools on a large and diverse group of knowledge workers also underestimates the complexity of their work activities. Information gathering, for example, is quite different from fact finding. Tools designed for sophisticated information retrieval may offer no guidance in authenticating the results set.

Most importantly, learning from KM’s past mistakes, PKM does not forget the social ingredients of the tools and technologies. Even a seemingly outdated approach, such as a paper-based filing system, is as viable as any solution for an individual knowledge worker for whom developing and maintaining such a system comes most easily and naturally. If it promotes the knowledge worker’s learning capabilities, enhances critical capacity and reasoning, helps promote the individual’s professional effectiveness, and extends normal memory, then it supports PKM principles beautifully.

In reality, an individual knowledge worker’s PKM strategy, reflecting a “knowledge as craft” complexity, will most likely draw from a variety of favorite tools, such as personal computers, PDA devices, topical websites or weblogs, notebooks, search engines (personal and external), and so on.

Conclusion

By now, the potential benefits of effective PKM to be reaped by both individual knowledge worker and knowledge-based organization should be apparent: lower attrition rates, higher morale, increased professional confidence, deeper thinking, iterative ideation, lower operational costs, enhanced workplace performance, and greater overall competitiveness. At the individual level, incentives to adopt a PKM strategy are obvious and immediate, set by peer example rather than management-ordered mandate.

Personal Knowledge Management offers an alternative to traditional enterprise-wide Knowledge Management initiatives, designed for similar results without KM’s known obstacles to success.

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