



UNIVERSITY OF
LIVERPOOL

**EXPLORING BEHAVIOURS THAT AFFECT
KNOWLEDGE-SHARING
IN AN EXPATRIATE SUPPORT HR TEAM**

A thesis submitted to the University of Liverpool for the degree of
Doctorate in Business Administration

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Abstract

This thesis explores behaviours that affect knowledge sharing in a small HR department that coordinates a wider network of international offices. The network provides support to the expatriate staff of a large energy company. The aim of the study was to determine why there was a serious lack of knowledge sharing within the core team and what measures could be put in place to rectify the problem. The absence of knowledge sharing within this core team, not only affected their ability to offer effective support to the wider network, but also negatively affected the way key stakeholders in the company viewed the team.

This study was undertaken as an insider action research project with the manager of the group as the lead researcher and all members of the team taking part. Five action research cycles took place over a six-month period. The cycles involved open discussion sessions where the team considered the potential causes of the problem and suggested practical actions to improve the situation. After a period of testing these actions, the team would reconvene to evaluate their actions and reflect on the process.

The practical solutions tested in this study revolved around the use of Microsoft's SharePoint application and also involved the creation of documents and procedures that improved working practices.

The discovery of practical applications was useful and proved to be successful for the team, however the study's key findings suggest that the culture of the team played a significant role in the creation of the problem. Historically, being custodians of the culture and knowledge owned by the team meant that individuals gained kudos for being experts. This had an impact on people's desire to share knowledge. The thesis suggests that adopting an open and democratic change initiative such as this action research study, can foster cultural change and improve working practices.

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Abbreviations

AR –	Action Research
DBA –	Doctorate in Business Administration
CID –	Customer Information Database
GT –	Global Team
HR –	Human Resources
KS –	Knowledge Sharing
KT –	Knowledge Transfer
PAR –	Participatory Action Research

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Chapter 1 Context and Problem Outline

1.1 Introduction

An organisation can count knowledge among its most significant assets (Bollinger and Smith, 2001). Indeed, the ability to transfer knowledge has been identified as a key factor in enhancing organisational performance (Argote and Ingram, 2000). Desouza (2003) notes that people are essential to the generation and transfer of knowledge. Employees therefore need to be placed at the centre of efforts to optimise the use and sharing of this significant asset. Thus, when problems exist within a team that affect morale and hinder the sharing of knowledge, there is a definite need for change. This thesis will describe an Action Research (AR) process, that generated solutions to an organisational problem related to knowledge management. These solutions produced change within a department and in keeping with the tenets of AR, the change was instigated by the people who were most affected by it and who benefitted from its outcome. This first chapter considers the factors that led to the initiation of the AR process by describing the context in which it occurred and then outlining the organisational problem considered in this study.

1.2 The organisation

The workplace in this study is a department within the Human Resources (HR) function of a large international organisation which will be referred to as 'Interco' for the purposes of this thesis. The department being studied will be referred to as the 'Global Team' (GT). The team plays a unique role in Interco's international HR division. GT is based in the organisation's headquarters and is made up of six people. These six people manage a global network of more than 40 local offices which will be called 'Satellites'. The function of the Satellites is to support employees and their families who move to international locations due to work assignments. Satellites provide practical

information on relocation and assimilation into new environments based on the experiences of Satellite staff and other employees who have lived in these locations. The Satellite teams and the central hub (GT) are made up of people from extremely diverse national, cultural, religious and educational backgrounds, which reflects the international nature of the wider organisation. A key element of international relocation is the ability to navigate the complexities of integrating with people from diverse walks of life. Thus, one important aspect of the department's role is coaching people on cultural awareness within both business and social contexts.

GT's role is to advise, train, support and equip the Satellite teams with information, solutions and knowledge. The success of the system depends on there being a constant flow of information between GT and the Satellites. GT provides the Satellites with information such as company policies and procedures, as well as professional tools and technical skills needed for their work. Interactions occur via virtual training sessions, regular phone and email communication, best practice teleconferences and periodic face-to-face regional training conferences. The various Satellites also communicate with each other to share ideas and insights. GT and the Satellites operate as an international network with strong links within and between teams. Many team members move from one location to another as they move around the world with their families, and the main purpose of the department is to pass on practical and relevant knowledge through a sharing network. GT consists of five team members and a manager. Each team member is responsible for a geographical group of Satellites. The author of this thesis was the manager of GT at the time the study was undertaken.

The genesis of the department has some bearing on the problems that are addressed in this study. The idea to create the original Satellites came from families of employees who needed support during relocation. These families were initially volunteers in the Satellite offices. Over time, their support was recognised as being invaluable and hence a professional system was put in place with the structure of an international network coordinated by a central hub. The central hub (GT) was established to standardise the work of the Satellites. Challenges however arise from the fact that GT is incorporated into the company's international HR function while the Satellites report to local HR teams who sometimes struggle to understand the nature of the teams and do not

necessarily consider their role to be a vital function. Local HR teams often have no experience of relocation and hence underestimate the complexities that arise when integrating into a new culture. For example, in recent years, many long-term expatriates have been faced with a new and unexpected challenge – repatriation. In the eyes of local HR teams, re-integration into one’s home country should not be a significant problem, however both research and anecdotal evidence suggests that this is one of the most difficult adjustments to make. Thus, GT and the international teams are required to manage the understanding of local HR when it comes to such issues. A further challenge comes from the fact that some stakeholders within the business, whose actions directly affect the network, have never had a complete understanding of the status of these teams due to the unusual genesis of the network. Presenting a professional, evidence-based and efficient service is therefore important for the credibility of the department in the eyes of stakeholders in HR and the business.

A final point to add to this context is the current worldwide economic and political situation; which greatly affects the oil and gas industry in which Interco operates. Cyclical changes are normal in the energy sector; however, the current downturn has been lengthier than expected. This is due to a combination of decreased demand and increased supply of oil and gas around the world. As these products also sit at the centre of international political machinations, the expectation is for conditions to remain at a low for the foreseeable future. In more prosperous economic times, this industry thrived on the international relocation of its employees, however in the current climate, maintaining expatriate employees is an expensive luxury, only to be adopted if necessary. Thus, people working in GT and the Satellites live under a constant (unspoken) threat of being downsized.

1.3 The problem

Although the department’s main function is to support international Satellites by sharing knowledge and information, there was a distinct lack of effective knowledge sharing between the team members of GT. This impacted on the team’s overall knowledge about how the Satellites operated. It also affected service provision and

relationships with stakeholders in HR and the wider business. At this juncture, it is important to note that this study focuses mainly on the problem within GT, however addressing that issue had a positive knock-on effect on other relationships. The other stakeholders are mentioned because the problem in GT had resulted in an inefficient department whose credibility with the Satellites, HR and business had been somewhat reduced.

A summary of the extent of the problem can be seen in the state of the department before the participatory action research study began. Diminished knowledge sharing meant that new joiners to the team often had inadequate hand-over information. As tenures in GT only run for three years, this was a perennial problem. Team members worked in silos and hence any unexpected absences - for instance due to sickness or sudden relocation - could lead to a breakdown in performance. Varying levels of service were offered to the Satellites, depending on the level of engagement of each team member. Information often had to be sought from people who no longer worked in the department, as there was no comprehensive way of recording knowledge. Staff were not engaged in the work of the team beyond their own individual tasks and hence the Satellites and other external stakeholders had lost confidence in the department. Lastly, existing team members did not actively encourage new ideas, as this required a change from the status quo and could possibly place a spotlight on their activities.

1.4 Role of the researchers

AR is by nature collaborative and centres on a joint learning and action process involving all parties concerned (Greenwood and Levin, 2007). Due to the participatory nature of this study, the narrative will often refer to the author in the first person and to the general team in the third person. In later chapters, the reflections and assumptions of key actors will be considered in greater depth. Following is a description of how we were affected by the departmental problem and why we chose to address it via AR.

I initially joined GT as a team member responsible for a geographic area and specific business functions, having briefly overseen one of the Satellites many years beforehand. During my time at the Satellite office, GT was yet to become established as a coordinator of the network. I had little interaction with central office, though some minimal guidance was provided on various aspects of my role. During this period, GT's reputation among the Satellites was less as a strong source of support and more as a distant nuisance at head office. By the time I became part of the team at headquarters, the current professional structure was well established and GT actively supported and trained Satellite teams. I joined the department on the same day as a colleague who was responsible for a different region and different business functions. It quickly became apparent that this colleague and I were having contrasting on-boarding experiences. The person I was taking over from, was still present and extremely engaged in her role. She provided me with very comprehensive information and passed on valuable knowledge and insights. My colleague on the other hand, faced a different situation. Recent changes to the make-up of the team and the absence of the previous incumbent, meant that there was very little information about the territories within his remit. This difference in our experiences highlighted the lack of a standardised structure for passing on knowledge within the team.

As new members of the team, my colleague and I jointly discussed several issues that bothered us; such as the absence of a coherent knowledge repository, the lack of consistency in following procedures and the tendency to work in silos. Some individuals held a wealth of knowledge about their own territories but knew very little about what was happening in other areas. A particular concern was the practice of asking former team members (who had long since left the department) for information and advice. This was partly due to the original set up of the network. The unique 'family feeling' mentality was intentional and had some definite benefits. However, it meant that people felt connected to the network long after they had left it and they remained invested in its activities. While this was nice, it struck me as unprofessional - particularly since previous employees still had access to information that would usually be considered confidential. When we raised our concerns with existing team members, our suggestions for change were met with resistance. The implication was that 'newbies' should just go with the flow, as this was the way things had always been done. The

manager at the time was very open to improvements but was limited by time pressures and was preoccupied with a major IT project. Team members were limited by the “not-invented here” mind-set.

Six months after joining the team, the manager moved on to another role and I became the manager. There were some challenges to overcome. Firstly; navigating the delicate waters of transitioning from being their colleague to leading the team. Secondly; addressing the department’s problems without alienating a group of people who might not take kindly to their former colleague upsetting the apple cart by implementing too many changes at once. It was important to ensure that any changes came from within the team, so that all members would take ownership of new ways of working. A key part of this would involve creating a mind-set in which people felt engaged in their roles and empowered to improve their own and the team’s performance. We also needed to find a workable solution to the problem of knowledge sharing and retention as this directly affected daily activities.

The consequences of keeping the status quo and not addressing the challenges at hand would be that services provided to our stakeholders would be mediocre at best and sub-standard at worst. The cycle of poor knowledge sharing and retention would remain and overall performance would continue to be affected. Additionally, stakeholders’ perception of the team’s level of competence would be diminished even further, which would in turn affect our standing in the wider HR department. During lean economic times, it is prudent to enhance a team’s standing rather than reduce it.

There would have been a need to address these problems regardless of external circumstances, however within a few weeks of my taking on the new role, the situation was acutely enhanced by a series of unfortunate coincidences. Due to various personal circumstances unrelated to work, three key members of staff were unable to function at their best and a delay in the recruitment process meant there was a long period where the team was understaffed. Not only did this increase our workload, it also highlighted the problems caused by poor knowledge sharing and retention. Team members who would otherwise have picked up the slack, found themselves hindered by poor understanding of processes and knowledge relating to relationships with key

stakeholders. This was the impetus for finding a jointly-devised solution sooner rather than later.

The disruptions in the team meant that it would take a few months before the AR group was formed. Once it was underway, all six members of the team became involved. Some staff in the Satellites were aware of the AR study, however there was no formal announcement made to the network as they were not directly involved in the discussions - though the outcomes did affect them. GT's AR group consisted of five women and one man from four different countries. Two of them are not native English speakers, though they are fluent; as English is the business language of the organisation. There were definite cultural and individual personality differences within the group that required navigation, however this would prove to be positive as it served to bring a richness to the quality and breadth of the AR discussions and to the actions that were taken as a result of the discussions.

1.5 Addressing the issue

As the methodology chapter will show, the decision to embark on an action research project was based on several factors. The main driving force from my perspective, was making sure that the team had an in-depth understanding of our problems and that they took ownership of the improvements needed to fix them. Reason and Bradbury (2008) note that AR focuses on the production of knowledge that can be directly applied on a regular basis. They further suggest that knowledge produced should enhance the well-being of the groups participating in the research. There should also be an emancipatory intent with a focus on a dynamic ongoing process of inquiry. The purpose is for AR to be driven by the people directly involved. Participation empowers and liberates the study group because they become their own change agents, rather than being subject to the will of an external force. In the context of our organisational problem, this was important for three reasons. Firstly; there was a need to break the existing mentality which could only be described as a cross between '*not-invented-here*' and '*this-is-how-it's-always-been-done*'. Clearly things were not working at an optimum level and yet there was a reluctance to disturbing the status quo. It was therefore important to create

a new status quo which had the buy-in of the whole network. The best way to do this was to start with the GT team, who would then cascade down new ways of working to the Satellites. Secondly; newer members of the team needed to feel as though their opinions were valid but their initiatives needed to work in harmony with pre-existing good practices. A joint effort between all team members was needed to create a 'new normal' in which both new and existing knowledge could be maximised. Finally; Saks (2006) notes that engaged employees are more likely to display positive attitudes and behaviours. Thus, addressing the team's disengagement by encouraging them to be the orchestrators of change could potentially improve team morale and performance.

It was important for me to examine my choice of methodology for addressing this organisational problem. I was already a scholar practitioner on the DBA programme prior to taking on this leadership role and my original choice of thesis topic related to a non-profit organisation which I co-founded and manage. On discovering the problems in my new team however, a participatory action research approach seemed to be the best problem-solving fit. I was conscious of not being swayed towards AR simply because it would provide convenient thesis material. I was also careful not to assume that the team would be as excited about a participatory study as I was. The emancipatory value of AR is obvious to those who have some knowledge of it, however to the team, it could potentially have felt like just another task to add to an already busy day. Worse still, it could have been seen as 'management speak' which has little value in the real world. This concept of 'management speak' is one that many of my colleagues often decry, particularly during periods of flux such as the one the company is currently going through. At such times, people want straight answers and a true understanding of what is going on around them, rather than trendy buzz words. Indeed, one of the key lessons I have learned as a scholar practitioner is the need to ground management solutions in a solid foundation of reality. Most importantly, any solution I settled upon, needed to be the best answer for the team, otherwise I would be doing them a disservice.

I considered other solutions; the most obvious being a knowledge retention strategy that is used to a limited extent by various departments in the company. This strategy –

known as ROCK (Retention of Critical Knowledge) involves a structured process of interviewing outgoing (often retiring) technical staff to gain a full understanding of their knowledge. The knowledge gleaned is documented and made available to the outgoing employee's successors. While there are some obvious benefits to this approach, including the creation of a useful guidebook, this process would not address fundamental problems of engagement and empowerment in the department. Being able to easily access information would have been a big step forward – particularly in an environment where there was no consistent knowledge storage method – however there would be no change in the team dynamics or in people's approach to work. In addition, the ROCK program involves having an individual from another department interviewing an outgoing team member. An external intervention did not seem to be the wisest option if one of the key aims of this project was to ensure that the team were truly invested in any changes that came about.

As noted above, there were various issues to address; key among these were team engagement and the lack of effective knowledge sharing mechanisms. When I began working in GT, we had no credible record of knowledge. What existed was a database of information about client movements which was shared with the Satellites. There was also a shared drive where documents pertaining to day to day tasks, information about Satellites, frequently asked questions and some general *'know-how'* was stored. Unfortunately, the shared drive was chaotic, difficult to navigate and non-comprehensive. The IT project that the manager was working on when I joined, was a total re-vamp of the client movements database. This was a specially designed platform embedded in the SharePoint system. SharePoint is an internet-based collaborative platform that is part of the Microsoft portfolio. SharePoint is multi-faceted and it was already being used by other departments in the organisation as a means of storing and sharing knowledge. The launch of the client movement database was successful, thus a few months down the line, when we began looking at solutions to the knowledge sharing problem, we naturally leaned towards using SharePoint as a knowledge repository. The job function of one of our team members was a support consultant for IT for the entire network. This team member had previously used SharePoint and would be instrumental in adapting the platform to suit our needs. She would also become an influential change agent during our AR process.

The successes and challenges of using SharePoint and the team's reaction to it, feature highly in the AR discussions. There were distinct differences between the reactions of those who were used to the old way of doing things and those who joined the team after we had begun to use SharePoint. Many actions taken after our group discussions related to improving the user experience of SharePoint and refining the team's use of the application. Primarily however, this study is not focused on an IT solution to knowledge sharing. This study focuses on understanding the causes of the problems in the department, through a journey of participatory AR exploration. The study also seeks to highlight the empowerment of the team that came about from finding their own solutions. In many ways, it also underlines the role of leadership in bringing change to a department.

1.6 Reflections

With hindsight, something that I failed to consider when I initially examined this organisational problem was the various biases of all the parties involved in this situation. The organisation prides itself on doing things in a particular way, which makes it a leader in its field. Indeed, the department in this study is a benchmark for other organisations who have a significant number of expatriate staff. The level of assistance given to staff and their families is unique and it is a justly-deserved source of pride for the company. Thus, it is not surprising that within such an environment, people do not welcome change until there is a dire need for it. Change in large organisations can be very slow, so we were fortunate to be focusing on a very small subset of the HR department which had always been relatively autonomous. This made our process faster than it otherwise would have been. All team members and stakeholders acknowledged the need to address certain issues. Nevertheless, this did not stop some within the team and various colleagues in related departments wondering what the point of our change initiative was. Bias comes in many forms and it does not have to be about one's political or philosophical persuasions. A simple belief in a way of doing things can become a bias that stops a person from even considering the prospect of entering new and uncharted waters. Similarly, whether an individual is

conscious of it or not, most people have their own personal agendas that affect the way they view their workplace, their colleagues and any efforts made to shine a spotlight on their way of working.

A final and important point to note is an unexpected level of complexity relating to the dynamics within the team, which had arisen by the time we began the AR study. During the period when the team was short-staffed, a small group of three people shouldered the burden of the department's workload and built a strong bond as a result. These three (including myself) learnt to rely on each other and to share knowledge – which helped us work more effectively under difficult circumstances. Thus, when new team members joined the group, there was an initial reluctance to include them in general discussions. Some of these new members picked up on this and reacted against this dynamic. I had to consciously foster an inclusive environment to overcome this problem. On the plus side, an informal open discussion culture and adherence to effective knowledge storing on SharePoint, was already in place among the three of us and hence once a more inclusive atmosphere was created, it was easy to set the tone for the AR study.

1.7 Research Objectives

In summary, the problem that is addressed in this study is one of a small team working ineffectively because of staff disengagement and a lack of knowledge sharing. Leaving the problem unsolved would result in poor services to immediate stakeholders and a diminished reputation within the wider context of the business. The team was already dealing with challenges to their existence by key stakeholders due to the unusual nature of its set up. In addition, the organisation was undergoing overall downsizing due to a severe downturn in the energy industry. It was important not to provide further reasons why this team and the wider network of 40 offices which it manages, should be included in the cutbacks.

AR nearly always begins with a question along the lines of *'how can we improve this situation?'* (Reason and Bradbury, 2008). The aim is to find solutions, bring about

change, work collaboratively and meet at the intersection between organisational knowledge and applied behavioural science (Shani and Pasmore, 1985; Coghlan and Brannick, 2013; Reason and Bradbury, 2008). As a scholar practitioner, the main reason for adopting a participatory AR approach was the potential for engagement of the team members. It would have been possible to use a command and control style of leadership to enforce better use of knowledge repositories, however this would not address the root cause of people's reluctance to share information. Furthermore, without ownership of change, the team would either resist, or adapt initially, and eventually return to old habits. Morgan and Zeffane (2003) note that employee involvement has an impact on organisational change initiatives. Bovey and Hede (2001) suggest that the failure of many corporate change programs can be attributed to employee resistance. They draw on the work of Coghlan (1993), Steinburg (1992) and Myers and Robbins (1991) to further suggest that this resistance is natural because change involves moving from the known to the unknown. The participatory nature of AR not only encourages a democratic approach to leading an initiative that involves change, but also centres on research taking place *'with'* stakeholders rather than *'for'* them (Greenwood and Levin, 2007).

Drawing on Reason and Bradbury's (2008) concept of improving the situation, the basic questions behind this AR study are as follows:

Why do we have a problem sharing knowledge in this team?

How can we improve this situation?

What factors affect our desire to make knowledge sharing the norm in GT?

In addition to these questions, a key objective was:

To collectively address these issues to ensure that the team took ownership of this initiative.

Understanding the underlying causes was the first step. Following on from that would be the process of considering solutions and ultimately creating a new way of working. My aim was to ensure that the team became more engaged by seeing themselves as agents of change.

Having provided the context of the organisational problem and the primary objective of the study in this chapter, the next chapter will outline the methodology adopted in this study. It will address the concept of Action Research and will also explain the method of analysis adopted to identify themes arising from the cycles. Chapter Three provides a detailed description of the research cycles which involved an iterative process of discussion, action and reflection. Concepts of interest that arose from this process were then used as the basis of a literature review which is described in Chapter Four. In Chapter Five, the findings discussed in the two previous chapters will be analysed and reflected upon. Chapter Six includes reflections on the entire AR process as well as a proposal for a final action research cycle. Chapter Seven concludes the study and considers its contribution to practice and opportunities for further research.

Chapter 2 Methodology

2.1 Introduction

The previous chapter highlighted a problem of diminished knowledge sharing within GT. Poor knowledge sharing had resulted in the team functioning ineffectively and delivering a substandard level of service to stakeholders. As the team leader, I preferred that any change to this situation should involve the input of the team. This was important for two reasons. Firstly, if we wanted to change the outcomes of our working practices, then we needed to change the way we behaved as a department. Secondly, team members needed to be more engaged with their work. Empowering the team to be orchestrators of change would ensure that creating new behaviours was a joint and communally accepted effort. It would also ensure that the team were personally invested in improving the status quo. Thus, the aim of this study was to collectively explore the causes of the problems in the department and find practical solutions rooted in the context of the team.

This chapter outlines the methodological approach that was adopted to address GT's knowledge sharing problem. Section 2.1 is the introduction, followed by Section 2.2 which considers my personal philosophical leanings that informed my decision to choose Action Research (AR) as a means of studying this issue. In Section 2.3, the concept of AR is explained, addressing its nature and composition. Section 2.4 highlights the complexities of my role as an insider action researcher. An overview of the data collection and analysis process is outlined in Sections 2.5 and 2.6 highlights. Section 2.7 rounds up the chapter.

2.2 Philosophical approach

There is a definite link between a researcher's philosophical leanings and how they choose to go about the process of inquiry (Creswell, 2013). I considered AR to be the

most appropriate research method to achieve the aims of this study, primarily because in the words of Susman and Evered; 'it develops the capacity of members of organisations to solve their own problems' (1978, p.601). As a social constructionist, AR is also a natural fit for me as a scholar practitioner. A key objective of this study was to put the team at the centre of exploration, so that any new ways of working that eventually evolved, would be acceptable to them, as they would have been instrumental in creating a change. AR creates a platform where workers who are directly affected by an organisational problem can devise practical solutions to suit their requirements. Gergen and Gergen (2008) note that the social constructionist viewpoint considers knowledge to be rooted in human relationships. The authors argue that truth - and a person's view of the world - is dependent on the context, community or tradition within which it is situated. A traditional positivist researcher objectively studies a phenomenon as a disinterested outsider, with the aim of finding replicable outcomes. In contrast, studies grounded in the social constructionist perspective, consider outcomes to be dependent on culture and context among other things.

There are many splinters to the social constructionist viewpoint, but the way it impacts the study of organisations in this context, is that the perception of knowledge is historically situated and embedded in cultural values and practices (Camargo-Borges and Rasera, 2013). This is in keeping with Coghlan's (2011) philosophy of practical knowing. Unlike the positivist notion of one universal known truth, the concept of practical knowing is contextual. It is driven by numerous factors ranging from language, to culture, to individual and group dynamics. Most importantly, it is dependent on how humans relate within these boundaries. In the study of organisations, one cannot gain a true understanding of why situations occur, without having an insight into the meaning that people make of the world around them (Coghlan, 2011). Furthermore, people's understanding of situations may change over time, depending on how they process and make sense of day to day situations. Whether sensemaking takes place on an individual or collective level, it ultimately results in people finding a way to frame situations within the context of their environment and then take appropriate action based on that context (Gioia and Chittipeddi, 1991; Weick, 1995; Weick, Sutcliffe and Obstfeld, 2005). Social constructionist researchers set out to make sense of their subjects' perspective

and hence qualitative research is often referred to as being 'interpretive' (Creswell, 2013).

In summary, the social constructionist perspective considers knowledge to be grounded in human relationships. What is deemed to be true or false is dependent on the values, culture and history of a given social group (Gergen and Gergen, 2008). For this study, two elements are significant. Firstly, people's behaviours and understanding of situations will differ from one organisation to another and hence solutions to organisational problems must be grounded in the context and social processes of the organisation. Secondly, the situational nature of understanding in this viewpoint means that knowing is practical and versed in the actions and reactions of participants (Coghlan, 2011). It is on this foundation that the choice of AR was made for this study.

2.3 Action Research

As noted earlier, the aim of this study was to collectively explore the causes of the problems in GT and find practical solutions rooted in the context of the team. I began my research as the new leader of a group of people who had become comfortable with an inefficient departmental culture. I was acutely aware of the challenges that could arise from an imposed culture change as opposed to one that was democratically chosen. My colleague and I who joined the team at the same time, noticed that suggestions given as potential solutions to the team's problems were often brushed aside. The implied rejection of such solutions was that they were not based on a knowledge of the way things worked within the department. When stakeholders outside of the team questioned our inefficiencies, their observations were also met with similar reactions. The idea that GT and the network were unique and should somehow remain so, even if this uniqueness was detrimental to the department's survival, had become an accepted narrative. Team members often told stories of people who tried to make changes but who failed because they simply did not understand that change was more hassle than it was worth. As the new manager, I believed that everyone needed to buy in to the need for change and this would only happen if they understood why it was needed. I also strove to ensure that team members were personally invested in any

changes that occurred. AR stood out as the most appropriate means of study to address these concerns. Greenwood and Levin (2007) consider AR to be a union of three features – participation, research and action. Similarly, Reason and Bradbury (2008) see the AR process as a democratic one, in which the development of practical knowing is paramount. AR does not involve powerless subjects being observed by a disinterested third party. Instead, members of communities and organisations, wield the power of inquiry into their own worlds and effectively realise sustainable improvements. (Greenwood and Levin, 2007).

Coghlan and Brannick describe AR as focusing on ‘research in action, rather than research about action’ (2013, p.5). Starting from a point of view of open-minded inquiry, researchers examine problems in an organisation alongside the people who are affected by the problems. The basis for AR is a cycle of planning, taking action, evaluating action and further planning as illustrated in Figure 2.1 below. This iterative process places action at the centre of the research (Coghlan, 2011) and the frequent reflection on action and evaluation of outcomes of action, ensure that knowledge is rigorously generated from the process.

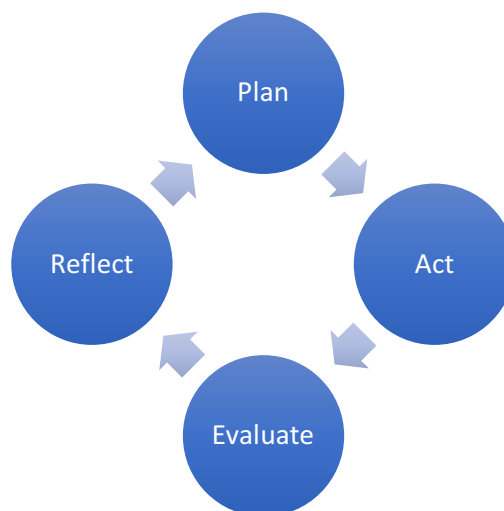


Figure 2.1 – Cycle of action research

In this study, value was derived from the potential to create change and the participatory nature of the undertaking. Having members of the GT team involved in

the different steps of the cycle ensured that the process of planning, acting and reflecting awarded each member the role of active participant. The empowerment that resulted from this was by design and is an expected outcome of the participatory nature of AR (Greenwood and Levin, 2003).

In addition to the empowering benefits of AR, the cycles of action and reflection were intended to serve two purposes. Firstly, it was a means of refining our departmental processes; thereby generating applicable (and sustainable) solutions to our departmental issues. Secondly, the aim of the discussion sessions was to uncover what lay behind the inefficiencies in GT. There were a number of questions we needed to consider, such as; what were the root causes of our problems? Did the context of GT create those problems; and if so how? It would also be interesting to find out why past and present team members happily accepted an inefficient system and why new recruits eventually fell in line with these practices. It was also important for us, as a group, to understand how the department's problems affected our interactions with the Satellites and with stakeholders in HR and the wider business. I anticipated that having a better understanding of these issues would have an effect on our main aim – which was finding workable solutions to our issues.

2.4 Role of the lead researcher

The form of inquiry adopted in this study is known as insider action research (Coghlan and Brannick, 2013). I was both the lead researcher and a member of staff. My intention was not only to serve my academic purposes as a researcher but also to help develop new capabilities for the department (Coghlan and Shani, 2008). Effectively, an inside action researcher wears two hats and must pay attention to two processes taking place simultaneously; a core research project and a thesis project (Coghlan and Brannick, 2013). Figure 2.2 below is an adaptation of Zuber-Skerritt and Perry's (2002, p.176) pictorial depiction of the two projects. The core project follows the steps illustrated earlier in Figure 2.1 – a repetitive cycle of planning, action, evaluation and reflection aimed at solving the organisational problem of diminished knowledge-sharing. The thesis project chronicles the learning derived from these cycles. Ongoing reflection at

the different stages of the process is an important aspect of this, not only to recognise learning but also to check assumptions and biases.

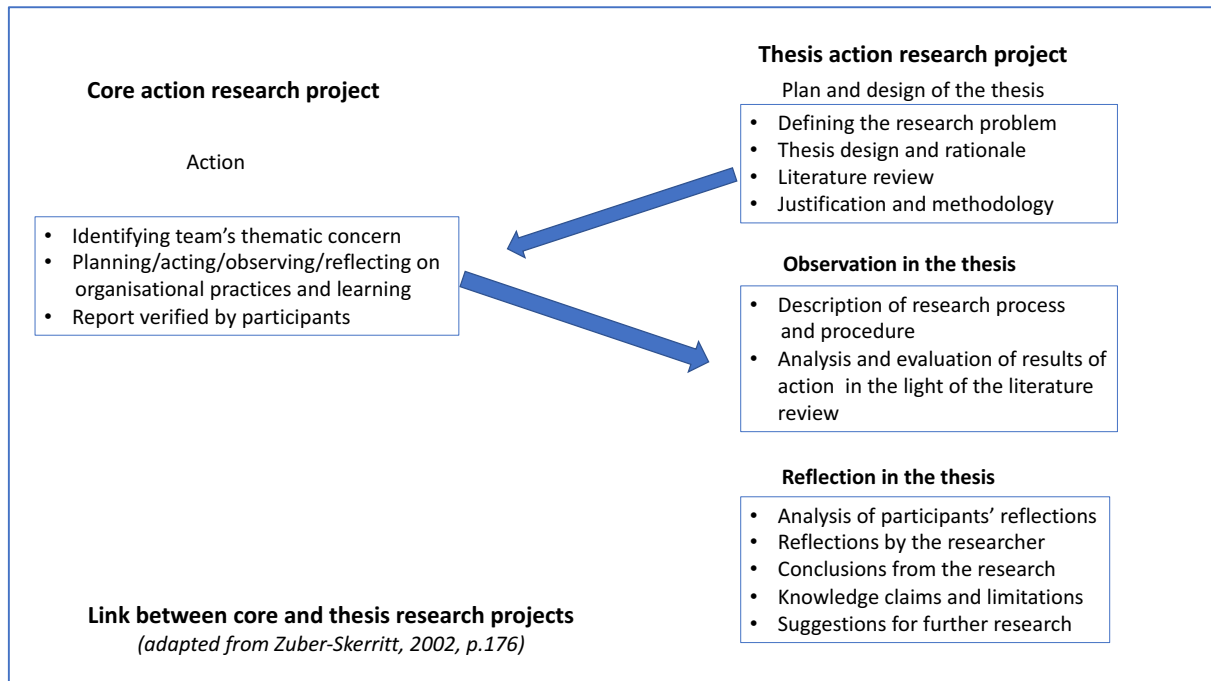


Figure 2.2 – Core and thesis research projects

2.4.1 Positioning myself

Researching from the inside offers a unique perspective which can present both benefits and challenges (Coghlan and Brannick, 2013). The dual position held by a scholar practitioner raises questions about bias, rigour and relevance; and highlights the interesting space I occupy when adopting first, second and third person voices at different points in the study (Coghlan and Shani, 2008). Examining my motives for inquiry into GT's problems runs alongside discussing, acting and evaluating the issues as part of the wider group. As a doctoral candidate, I am also interested in how the knowledge uncovered during our inquiry can be of benefit to a wider community.

Ellwood (2015) suggests that the methods, purposes and responsibilities that come with being engaged as an inside action researcher should be interdependent. This is in keeping with my perspective of my role as a scholar practitioner. It was important for me to give equal focus to academic rigour and organisational relevance. There is no denying that tensions arise from preunderstanding and organisational politics (Coghlan and Shani, 2008). It can be difficult for a researcher who knows the ins and outs of an organisation to step away from what they already know and attempt to study their company objectively. In my case, I suspected that the informal set up of the network in its early days and GT's subsequent push to find its place as a professional department within HR, may have had some bearing on our practices and on the perception that stakeholders had of us. It was important however not to impose my impressions on the process of discovering the root causes of our issues. The constant reflection involved in AR served as a tool for consciously recognising these conflicts and working to overcome them. During my study, I strove to adopt a critical approach to some of the underlying cultural elements that I believed lay at the root of the problem. On the other hand, I further questioned whether my criticality was truly constructive or simply a sign of dissatisfaction with the status quo. I was also aware that as team leader I contributed to - and benefited from - the same 'expert culture' that needed to be addressed. As Costley, Elliot and Gibbs (2010) note, my awareness of where I was situated both within the context of the organisation and the context of the study served to address some of the challenges of being an inside action researcher.

2.4.2 Addressing bias

Having insider knowledge about the organisation and the people taking part in the study, creates an element of bias. It is very difficult to avoid bias in a study such as this, however Creswell (2013) notes that clarifying bias from the outset highlights the fact that the researcher is aware of their own shortcomings. This study attempts to do this by openly commenting on my position, experiences and orientation that affect my approach and interpretation of the study. In the next chapter, the history and experiences of the team - including myself - are outlined, as they (potentially) have a direct impact on some of our perspectives on the problem in GT and how we each

responded to the change initiative. In addition, during one of our discussions, we tackled the issue of our individual opinions on the method of study in the context of our department.

2.4.3 Ethics

Costley, Elliot and Gibbs (2010) highlight the ethical implications of how my own ideological position affects the study. In this thesis, I openly question whether my choice of action research is simply convenient for my own goals as a DBA student or a legitimate means of inquiry to solve GT's problems. As shown earlier in this chapter, the choice of AR as a method of study meets the objectives of what was needed for GT at that time.

There were other ethical considerations that needed to be addressed prior to undertaking the AR study. The most significant was my position as the manager of GT. It was important that none of the team members felt obliged to take part in the study for fear of potential repercussions as I was also the person responsible for their annual performance appraisals. This issue was openly discussed with the team in the presence of my line manager. Each team member was then given an information sheet with details of what the study would entail, along with a consent form. Participants were given four weeks to consider the details and decide if they would like to take part. The consent form (see Appendix 1) outlined the fact that their participation was voluntary and that they were free to withdraw from the study with no repercussions at any time. It was also made clear that their identities would not be revealed and issues surrounding the use of data as well as health and safety considerations were also made clear. All participants voluntarily signed the consent forms.

2.5 Research methods

The AR process was an exploratory one. It began with an awareness of the existence of a problem and an understanding that concrete actions would be taken, and those actions

would be evaluated. There was however no initial certainty as to what those actions would be. This is because AR is built on the foundation of a collaborative process of knowledge development (Greenwood and Levin, 2007). Our planning stages took the form of open discussion sessions where the team discussed our frustrations with the status quo, and delved into what we believed to be the reasons for the absence of an effective knowledge sharing culture in the team. As lead researcher, I posed some basic questions to steer the conversation but generally allowed team members to speak freely about topics relating to the issue so as to gain a breadth of data and deeper insights into the team's perspectives on our problems. At the end of each discussion session, we pinpointed an action (or actions) usually relating to the use of the SharePoint knowledge repository. We performed these actions for a month and then reconvened to evaluate and reflect on our actions. We also used the subsequent discussion sessions to refine various working practices relating to SharePoint and other practical actions relating to the sharing of knowledge both within GT and with the wider network.

Figure 2.3 below, builds on Figure 2.2 to illustrate the sequence of the AR process. It shows that the cycles of discussion and action were the starting point of the core research project. Their focus was brainstorming about the problems that existed in GT, settling on potential solutions, putting those solutions into action and then evaluating the success of those actions in order to refine them. The five cycles of the study revolved around this iterative process, with the result being the creation of practical solutions relating to improved knowledge-sharing methods. Sitting alongside this, was the emergent fabric of discussion, reflection and analysis which revealed our individual and collective insights into the sources of GT's problems and the potential ways in which sustainable change could be effected. Two forms of analysis and reflection took place – the group's consideration of the problem and my own consideration of the problem, the process and the people involved. This parallel consideration formed the bones of the thesis project. Figure 2.3 shows the co-existence of the two projects and outlines the steps that link them together. While the action research cycles were the launching point of the study; defining the problem in GT and setting parameters for the design and choice of methodology was the starting point of the thesis project which in turn influenced the choice of AR for the core research project.

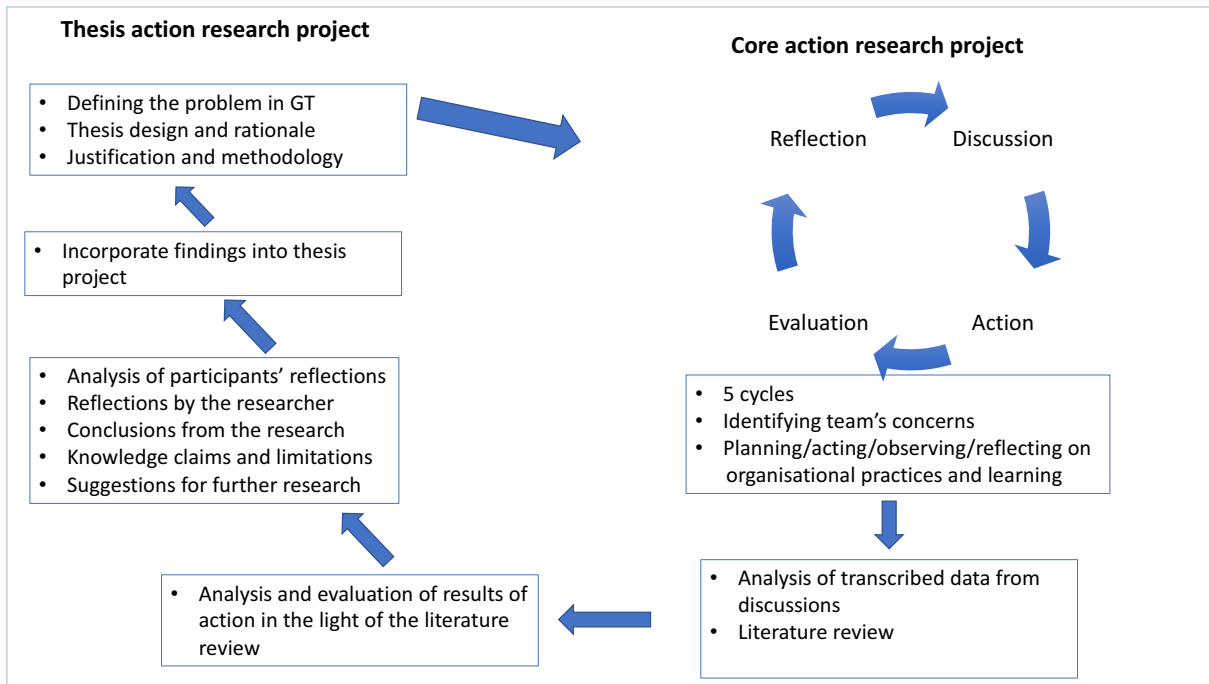


Figure 2.3 - Thesis action research project versus core action research projects as undertaken in this study. Adapted from Zuber-Skerritt and Perry (2002, p.176)

2.5.1 Data collection

Five cycles took place over a six-month period. Two forms of data were collected during this time. The first was recorded information that came from our discussions. Each discussion session was captured using the voice recorder function on my phone. The recordings were transferred to my computer and stored in files named AR Sessions 1 -5. My own ongoing reflections after some of the sessions were spoken into a recorder and have been incorporated in the fabric of this thesis. After the cycles, the recordings were sent to an independent transcriber who produced the conversations in a series of Word documents. As the transcriber did not know the names of the participants, the various speakers were labelled as Female 1, Female 2, Male 1 etc. Thus, once the transcription was completed, I went through the Word documents while listening to the recordings and assigned the correct names to each speaker so as to be able to analyse each participant's contribution to the discussions.

The second form of data collected was a questionnaire given to the participants half-way through the AR process (see Appendix 2). The purpose of giving the team this questionnaire was to gauge their thoughts on the actions that had been taken thus far. The team was asked to elicit responses relating to whether they considered SharePoint to be an improvement on our previous systems, the challenges and benefits of SharePoint, as well as their reflections on the process of analysing the department's problems within the open discussion sessions. The purpose of the questionnaire was to evaluate the team's individual assessments of how well the action element of the AR process was going. Their reflections also helped me tailor subsequent discussions to address areas of shortfall.

2.5.2 Data analysis

Once the data had been transcribed, three steps were taken to extract relevant information; coding, logging themes into an Excel spreadsheet and cross referencing. Creswell (2013) describes coding as a system of aggregating text into small categories to determine which categories within the data help to generate knowledge from the study. For this study, I adopted a manual system of carefully going through all the transcribed data to identify different themes that arose during our discussions. Firstly, I read each Word document and made comments using the review/tracking function. Initially these comments were simply my thoughts on what the team had said and why. This was followed by a second reading of the transcripts during which key points were categorised and assigned labels relating to overarching themes. For example, a comment relating to the uncertainty surrounding the future of the network was labelled as 'Job Security' while comments relating to the effects of historical practices on the team were labelled 'Organisational Culture.' The themes identified were logged in an Excel spreadsheet (See Appendix 3) and the spreadsheet was used to highlight recurrent themes that proved to be pertinent to our departmental situation. The final step in this process was cross-referencing. Focusing on the recurrent themes from Excel, I re-examined our conversations to determine the context of those themes and how they informed our knowledge sharing behaviours. This iterative process of re-examination also served as a means of checking whether my thematic classifications were apt for the context of the discussions. What emerged was a recurrence of themes

relating to knowledge hoarding, power, trust, organisational culture and leadership. These themes became the basis from which the literature review was conducted.

As this was an emergent study rather than one with pre-determined hypotheses, I conducted my literature review based on the themes that arose from the five cycles rather than doing a general review on knowledge sharing before the cycles. This approach was designed to encourage debate within the PAR group. A fixed academic/theoretical framing of the study from an initial literature review would have steered our discussions in a pre-determined direction. In addition, there would have been little benefit to understanding why certain behaviours had become the norm in GT if a broad review of literature had been carried out. In conducting the literature review after the AR cycles, my aim was to determine whether the extant literature corroborated the findings from our study and provided new insights that I had not considered. I also anticipated that such new insights could be introduced once the AR cycles were underway and could possibly serve as a creative impetus for the future course of subsequent AR cycles.

2.6 Overall analysis and next steps

Details of the emergent themes that were examined in the literature are covered extensively in Chapter 4 and an explanation of how these themes emerged from our discussions is outlined in Chapter 3. The next step, after reviewing the extant literature, was a reflective analysis of the entire project based on the outcomes of the literature review and my reflections on the action research cycles. This is documented in Chapter 5. As has been noted previously, this study effectively consists of two projects running in parallel. At this point, the core research project had produced solutions for our team that had already improved our working practices, even though they would still require ongoing refining. The literature review provided a deeper academic perspective on how emergent concepts could have shaped the behaviours of team members in GT. It also provided food for thought on how to ensure that our solutions would remain sustainable within the context of the department. Bringing the various threads of the study together for the purposes of reflection and analysis was central to the thesis project. This aspect of the study helped to create a balance between the focus that

comes from the personal involvement of a team leader seeking solutions and the focus of a researcher attempting to consider a problem within a bigger academic picture. This analysis stage also led to the imagining of a potential final cycle of action and reflection.

2.7 Conclusion

This chapter has explained the rationale for adopting an insider action research approach to explore the knowledge-sharing problem in GT. It further outlines the processes that took place both within the core action research project and the thesis action research project. Lastly, details of how data derived from the study was analysed is shown. The next chapter gives a detailed account of the AR cycles.

Chapter 3 Action Research Cycles

3.1 Introduction

The previous chapter examined the rationale behind adopting Action Research (AR) as a means of solving the of problem poor knowledge-sharing in my department. The team in question – ‘Global Team’ (GT) - is the central HR hub of a network that supports the movement of expats and their families for a large international organisation – ‘Interco’. As noted previously, there are several small international offices around the world; referred to here as ‘Satellites’, which handle the day-to-day support of employees. GT’s role is to support these Satellites via training and knowledge provision among other things. As outlined in Chapter 1, when I took over as manager of GT, I was presented with the significant problem of diminished knowledge-sharing within the team. This affected productivity and effectiveness and resulted in a tarnished reputation of the team in the eyes of key stakeholders. Most important was the effect on our relationships with the Satellites and the difficulties we faced in determining how effective the Satellites were at delivering their objectives.

The decision to conduct an AR study was driven by my desire to ensure that all participants in the team took personal ownership of the changes that I hoped to introduce to the department. The participatory nature of an AR study is only effective if the active players in a change process can exercise power (Greenwood and Levin, 2007). It was my intention that the empowerment of the team and the results we saw from the change, would improve engagement and create individual (and joint) investment in a new way of doing things that would become the norm. This chapter adopts Coghlan and Holian’s (2015) approach of recounting the story of the AR cycles by outlining the actual process of the study which took place in GT. It will describe how we moved from considering a problem, to acting upon it, reflecting on our actions and adjusting our solutions based on our evaluations. It will also address factors such as the assumptions and biases of various members of the team and how these affected the study.

3.2 Setting the scene

According to Argote and Ingram (2000) knowledge sharing occurs when one actor in a network is affected by the experience of another and the effects of this experience bring about a change in the performance of the recipient of knowledge. There are various means by which this can be done, but as noted earlier, a participatory approach ensures that the actors in this scenario have a vested interest in the success of a knowledge-focused change project. Nonaka and Takeuchi (1995) suggest that creating a face-to-face platform where people can share ideas is critical for knowledge sharing. This is exactly what occurred in this AR study.

The creation of a space where team members could freely discuss problems and solutions, fostered an enabling environment for learning and change. AR is by nature complex, and in this specific study, there were certain elements that added to the complexity but which also provided fertile ground for transformation. Shortly before the discussion sessions began, I found out my family and I were relocating to Australia. This was my second relocation in three years, as my spouse is coincidentally one of the expats that move around the world with Interco (ie; the kind of employee/family supported by our Satellite network). The significance of this move was twofold; firstly, a sense of urgency was created with respect to seeing tangible change in the department before I relocated; and secondly, the team were acutely conscious of ensuring that a new manager and future team members would place as high an emphasis on knowledge sharing as the current team did. Having an in-built sense of urgency was fortuitous. Kotter (2008; 2012) suggests that a sense of urgency is a key element needed to kick-start a successful change initiative. It however also posed a potential problem in that there was a danger that the desire for results would lead to rushed and orchestrated cycles rather than organic discussions, actions and reflections. A further area of complexity came from an issue that was briefly mentioned in Chapter 1. This revolved around the dynamics of the team and will be discussed in detail shortly.

There are two significant factors that all participants acknowledged as being important; but which we had to accept were beyond our control. The primary factor is that GT (and

the Satellites) have a high turnover of staff. Jobs in the network have a three-year tenure. This is partly to encourage inclusion and maintain a fresh perspective in the international locations; and partly because most of Interco's expat assignments last between three to five years. Some Focal Points (team leaders) at the Satellite offices never manage to finish their full tenure due to unexpected relocations. For GT, there is a further legal factor. GT is based in the company's headquarters in a European country. Team members are given three year contracts, which according to this country's employment laws, would need to be converted to permanent contracts if the three-year period is extended. Thus, extensions are never given. As GT is responsible for policy and strategy-setting for the network, this regular turnover can lead to frequent changes in direction. The absence of effective knowledge-sharing was acutely highlighted by frequent changes in staff and contributed to the lack of effective hand-over procedures. The second significant factor is the sprawling and ever-changing nature of the wider organisation. There is a lot of movement in stakeholder departments. This translates to changes in the way various people in the business view our support network. For example, a Head of HR or Finance in a Satellite location who believes expats need no more support than local staff, may choose to cut funding for that Satellite office. A few years later, a new person in that role, who happens to be an expat and understands the need for the support, could re-instate the funding. This is of course not just down to personal whimsy but is also backed by trends in the industry at that time. As a team, we embarked on this study fully aware that these issues were beyond our control. Thus, while the topics of turnover and organisational changes are often referred to in our discussions, they were not a focus in our change initiative. At various points in the discussions, team members noted that while issues of tenure and changes in the company did affect the department, structured knowledge-sharing methods would serve to alleviate the disruptive effects of these changes. Thus, our focus was on creating a culture and putting systems in place that would make knowledge accessible for incumbent GT staff and make the process of passing on knowledge to new team members and Satellite staff more efficient. In short, our aim was to work around those bigger problems rather than trying to fix them.

3.3 Participants

There were six participants in this study, including me - the lead researcher. Brief details of the other participants are given below with names changed. The team were happy to be identified and my line managers were fully aware of this study, however I prefer to keep the company identity unpublished and hence the use of pseudonyms and substitute departmental names. During our discussions, we commented on the team's members having two distinct differences in approach to managing their various tasks and Satellite territories. One team member summed this up as there being some within the team who were more task-oriented and some, more relationship-oriented (Tabernero et al, 2009). It was noted that these distinctions affected the way we expected to receive and share knowledge.

Mabel was the IT guru of the team and a significant player in this process. In her late forties and local to the European country in which we were based, she was a seasoned expat who had lived and worked in several of Interco's more interesting locations. She had worked in three Satellite offices and had been Focal Point in locations in the Caribbean and the Middle East. She spoke English fluently as a second language, was considered the elder statesperson of the group and a formidable force. She is a task-driven individual, the most inclined to action and was integral to the creation of solutions within and around SharePoint.

Bryan was the Adviser responsible for Satellite offices in the European and Americas region. He was also the liaison for key stakeholders in HR and third party contractors. Bryan joined the team at the same time as I did, but as previously noted, had a more difficult transition because of poor knowledge availability for his role. This was his first expat movement due to his spouse's role, though he had moved internally within his home country (USA) for this reason. He had a background working in the US correctional system and was studying for a HR qualification that facilitated his new role. In his mid-forties, Bryan is a task-oriented individual, however he is the most reflective member of our group and the most inclined to consider all options and have a full understanding of an issue before committing to a solution.

Sally joined the team at a critical point when we were desperately short-staffed and suffering from the effects of poor knowledge retention. She took over the position of Adviser for Asia Pacific and Russia after I left the role to become manager. The eldest of the group in her mid-fifties, she is a UK citizen who lives permanently in the country in which we were based and has a long history of connections with our network. She had previously worked and been affiliated with two of the larger European Satellite offices. Sally strikes the balance of being task and relationship-oriented in equal measure. She was most inclined to offer practical solutions and adapt to change.

Katherine was the youngest of the group – in her early thirties – and was the Editor of a publication produced by our department and distributed globally to the company's nine thousand expats. Originally from the USA, Katherine has lived on three continents and worked in different areas within Interco. A fiercely task-driven person, she joined the team when the use of SharePoint had already begun and hence had no affiliation with the previous knowledge storing system. A stickler for working efficiently, Katherine was the person most able to critically evaluate our working processes.

Rihanna was the last to be recruited during my time as manager. In her mid-forties, she was the Adviser for Africa and the Middle East region, had a very international background and spoke four languages. Rihanna was the only member of the team that could be described as predominantly relationship-focused in her approach to supporting the Satellites. This gave her a different and often refreshing approach to problem-solving. She was also however the most inclined to be affected by team dynamics.

A final mention must be made of Barbara who took part in the very last AR discussion as a casual observer. She took over as GT manager when I left the team. Aside from Barbara, there are references in the discussions to past team members - some of whom were in the team when Bryan and I joined, but none of whom were part of the AR discussions.

The inclinations, positions and individual focus of the team members are relevant because they affected the way people approached our change initiative. Members of the

group reacted differently to being empowered within the team. The majority of the group saw empowerment as an opportunity to strengthen ties within the team and present an improved (and united) front to stakeholders. This improvement and the interesting nature of our AR process brought some positive attention to the team from the wider HR department. There was however the delicate issue of team dynamics which did test these newly strengthened bonds. As previously noted, prior to the launch of the AR study, there was a period of a few months where there were only three people carrying the burden of six people's roles. These three were me, Mabel and Bryan. Bryan and Mabel served as sounding boards for me during the initial process of deciding to solve this problem using the AR method. Mabel identified the potential for SharePoint to be instrumental in solving our knowledge sharing and storage problems. The three of us organically initiated a culture of openly discussing problems which had not been standard practice in the team beforehand. When Sally joined the team, there was initially tension because she had to find a place within this unit, however she navigated this successfully because she had some prior knowledge of the network and the ability see the benefits of our planned changes. Katherine joined next, and was also able to make the transition, however it proved more difficult for Rihanna and while these tensions were short-lived, they affected Rihanna's perception of her place within the team. On reflection, this also affected how vocal Rihanna was during the discussion sessions.

3.4 Adopting SharePoint as a knowledge-sharing repository

Many of the actions and evaluations in our discussions centred around the Microsoft application SharePoint, which was our chosen knowledge repository. As outlined in Chapter 1, the idea of using SharePoint as a dedicated knowledge repository came about when we noticed the success of a separate client information database (CID) based within SharePoint. Prior to the introduction of SharePoint, the team stored information about procedures and knowledge relating to the various Satellite offices in a shared drive which was nicknamed 'the Black Hole' because it was impossible to find information when needed. The Black Hole suffered from a lack of structure and accountability, which allowed team members to create numerous amounts of folders

that were named according to whatever took the creator's fancy. This meant that valuable information could not be found when required. A case in point was the handover documents created for Bryan. For the first few months, he believed there were no records of the territories he covered because the person he took over from, had already left the team by the time he joined. His early weeks in the role were difficult and he felt at a loss as to how to provide adequate support to the Satellites with very little knowledge of what was needed for these locations. The documents were eventually discovered in the depths of the Black Hole but only because the previous incumbent – who by this point worked in one of the Satellite offices – happened to mention in passing where they were. This much-needed knowledge arrived a good six months too late for Bryan and he believed that his lack of knowledge in the early days affected his relationships with his 'customers', which in turn affected his ability to do his job with confidence. There was a transitional period of a few months where SharePoint and the Black Hole were used concurrently. Newer members of the team like Katherine and Rihanna were introduced directly to SharePoint and had no problem transitioning, whereas older members of the team – particularly Bryan and I – had to make a conscious effort to work in a more efficient manner. This was ironic considering it was our dissatisfaction with the inefficiencies in the department that led to the AR study.

The precise use and technical specifications of these applications will not be considered in detail, as this study focuses more on the departmental transformation than on the information technology aspects of storing knowledge. It is however important to note that our differing attitudes to using SharePoint will be examined, because it highlights the importance of organisational culture and individual behaviour in promoting knowledge sharing. Although we all decried the poor state of knowledge sharing in the department and constantly joked about the Black Hole, it still took a major mental shift for some of us to move from using that system to a more structured one in SharePoint. This point will be examined further later in this chapter. A final element that is often mentioned in the discussions is a collaboration site designed by Mabel within the SharePoint platform. This was not initially part of our study, but our successful use of SharePoint within GT led to a decision to roll out the improved storage and sharing of knowledge with the Satellites. This site would allow a free flow of information between us and the focal points; and make it easier for us to keep track of what was happening in

the international locations. The collaboration site was in its infancy when I left the team but it later became a very successful knowledge sharing platform.

3.5 Introducing AR to the team

The benefits of adopting AR as a technique for delving into the department's problems were clear to me as a scholar practitioner, however it was not a concept that the rest of the team were familiar with. I formally broached the subject of using our situation as the basis of my research to the whole team during one of our weekly team meetings. The idea was extremely well received. I had discussed the possibility of doing this study with Bryan and Mabel some months prior to this. I had worked closely with them when I first took on the role of manager and the three of us had served as sounding boards for each other during the department's difficult transition period. Bryan was studying for a Masters in a HR-related discipline and was very interested in the use of empirical evidence to improve organisational settings. As Mabel oversaw the network's IT functions, she was excited by the prospect of being instrumental in changing a broken system. There was a period of a few months between my discussions with them and the cementing of the concept of the study in my mind. I was wary of imposing my preference on the team and unsure whether the timing was right for embarking on a change initiative. We had experienced various staffing upheavals and were still managing the network's transition to a new Customer Information Database (CID) within SharePoint. I was also conscious of our team being a small cog in a big machine and I was unsure how much autonomy we had to address this issue. The team's receptive response to the idea, as well as the positive reaction of my line manager, paved the way for a smooth process of applying for ethical approval for the study.

Despite this favourable response, the fact remained that the team did not have an in-depth understanding of what was involved in conducting a PAR study. Thus, over the course of the next two team meetings and a few general group huddles, I outlined the concept of us as a group discussing our problems, generating actionable solutions, putting those solutions into practice and then evaluating the actions we had taken. I

showed the team the diagram depicted below in Figure 3.1. As noted in Chapter 2, this diagram perfectly illustrates the pattern of the AR process.

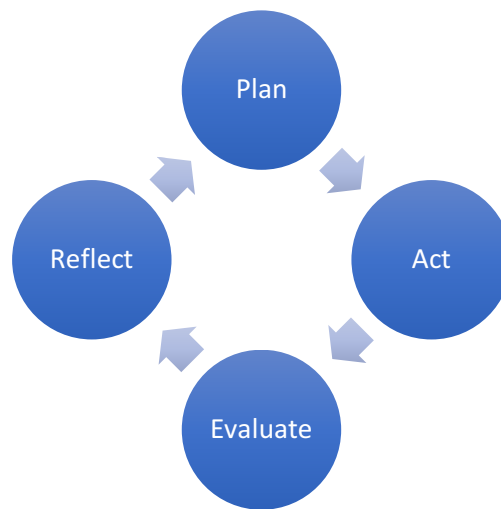


Figure 3.1 – Cycle of action research

I explained that we would be embarking on a continuous process of planning (discussing), acting, evaluating and reflecting on what we had done. I also explained that our study would be exploratory because we needed to find out why this problem existed in order to attempt to fix it. The team posed questions relating to what our expected outcomes were and how we would determine the end of an iterative process. Katherine wondered whether an emergent study could result in us finding no solution at all. I would find later in the process that we were all sometimes guilty of being fixated on the action/solution element and on occasion, I had to remind the team - and myself - about the importance of the various steps in the cycle. Perhaps in the back of our minds, we saw success as finding a clear solution to our problem and I believe this is an example of where an AR practitioner must manage the potentially conflicting purposes of a study like this.

3.6 Organisational arrangements for the AR sessions

In designing the structure of the AR sessions, I allowed for the discussions to be fluid and for actions to be derived from our conversations. I however understood that there was a need to have a structured approach to the physical setting of the discussion forums. I had been advised that we needed to make a clear distinction between our

regular team gatherings and the AR discussion sessions. The team already had weekly group meetings and as manager, I had regular one-on-one sessions with each team member; however, these sessions focused on performance and the day to running of the department and the network. By design, the AR discussion platforms were conducted in a different environment from our usual team meetings. The sessions took place in special boardrooms that were in a different part of the building. The rooms were set up to be aesthetically different from our standard meeting venues. I wanted the team to make the psychological switch in their minds between simply talking about the running of the department and actively contributing to a change discussion. Each session ran between forty-five minutes and an hour during the team's lunch break. Refreshments were provided to create a relaxed feeling of camaraderie. This relaxed atmosphere also created an enabling environment for people to speak freely without fear of judgement. Prior to the discussions, we agreed that all contributions were welcome and that no comments would be deemed as pointless. I believed there was merit in allowing some discussions to go off on a tangent (within reason) to gain deeper insights into the team's thoughts and perspectives. Thus, the nature of the sessions was informal, but I provided structure and direction by asking questions which focused initially on the problems within the team. As we progressed through the process, my questions also focused on our reflections on our actions and refinements that needed to be made to our new ways of working. In practice, our cycles fell in line with the process illustrated in Figure 3.1, i.e.; plan, act, evaluate, reflect. In our context, the concept of 'planning' took the form of discussions about our departmental knowledge sharing problems. We decided on actions, put them into practice in our daily routines and then evaluated their success and reflected on potential areas of refinement at subsequent meetings. Sometimes, evaluations and reflections took place as actions occurred without waiting for the next meeting. Most of the actions involved new ideas and specific adaptations relating to how we used SharePoint. Another key element was encouraging the team to jointly discuss and improve upon knowledge that was useful to our roles. For example, Sally shared a simple but effective method of gleaning information from outgoing Focal Points that she used during their exit interviews. This method, and the subsequent action of storing the information gained in SharePoint, not only ensured that we had valuable information about the location, but also reduced Katherine's workload in finding the location's statistics for the network's annual report.

3.7 AR Cycles

Five AR group sessions took place over a six-month period. The following sections will describe and reflect on the AR cycles, noting key events, insights and outcomes and considering the participation of different members of the team. Some of the themes that emerged will also be highlighted.

3.7.1 Cycle 1

The purpose of the first discussion session was to create a relaxed forum of sharing and to encourage open channels of dialogue. It was also to understand our perspectives on the team's problems without necessarily trying to find solutions. Lastly, it was an arena where we could jointly set the parameters of what we were trying to achieve in the study. My key observation from this first outing, was that no one held back their opinions and there was no hesitation about constructively challenging each other's perspectives. Indeed, one of the notes I made at the end of the session was as follows:

'As a round up, I think this session tells a lot about the personalities in the group and shows what happens when people are free to talk about issues that they had not previously been able to address directly.'

This was a conversational forum with many topics considered that affected the team and the network. Not all were related to knowledge sharing but all had some bearing on the DNA of the department. Although the fluid nature of this session was by design, a comment from Mabel as we rounded up reminded me that this 'design' needed to be shared with the team and I did so in the next session. She wondered how much of what we had discussed was relevant to the study. In fact, those topics that did not focus solely on knowledge sharing, highlighted individual perceptions and underlined the culture that contributed to the knowledge sharing problem in the first place. All six members of the team took part in this discussion and our starting point was defining the scope of the study.

Determining the scope:

During this first meeting, I asked the group to decide what we wanted to include in the study and whether the focus was solely on GT or on the entire network. It was important to set these parameters, because the knowledge sharing problem was not unique to GT. Some of the offices in the network had serious problems relating to ineffective knowledge retention/transfer. This was partly because those Satellites worked autonomously from the local HR offices and partly because previous GT advisers had not encouraged standards rules. Thus, some local offices were not fully accountable for their actions and the absence of accountability meant that some Focal Points moved on without passing on any knowledge to their successors. In one case, a Focal Point left with important administrative details needed for the day-to-day running of the office. It is important to note however, that this was not the case in all locations. Indeed, some offices had extremely efficient and sophisticated hand-over procedures. There was therefore a need for GT to standardise procedures across the network. Improving our own knowledge sharing processes and accountability was one step toward doing this.

Despite the clear need for change in some of the Satellites, we decided that this AR study should focus only on GT. There were two reasons for this. Primarily it was more manageable and easier to evaluate the activities of one department of six people than to monitor the actions of one hundred and eighty staff in thirty locations. Secondly, we were united in the view that fixing the problems in GT, which is the heart of the network, would eventually have a cascading effect on the Satellites. Indeed, much of the knowledge sharing behavior that was fostered because of our sessions, directly impacted the ways in which we supported the locations in subsequent months. Thus, our discussions would examine the working practices and culture within GT and pinpoint actions that could make knowledge storage and sharing more effective.

Themes:

Some interesting themes emerged during the initial discussion session. At this point in the proceedings, I did not assign the label of 'themes' to these topics. I simply noted them down as topics of interest that inspired a healthy debate or that gave the group pause for thought. In this meeting and in subsequent sessions, the issue of staff turnover was discussed at length. We however agreed that our efforts should focus on working towards making changes that would alleviate the effects of high staff turnover on knowledge transfer. We also discussed the need for greater accountability – for both GT staff and the Satellite offices. For GT, the success of SharePoint as a knowledge repository would depend on everyone being accountable for using it correctly. This was an area that would be addressed further in later sessions. A topic that received much attention – thanks to Mabel's accurate summation of the complexities of working in some of the Satellites - related to the effects of historical events on understanding why certain behaviours had developed. This was of relevance to both the GT team and the Satellite staff. We noted that there were two important factors to be considered here. Firstly, as noted in Chapter 1, the genesis of this unique network meant that it held a special place in the minds of past and present staff. Certain ways of working – though not always efficient and hardly up to the company standard - were embraced by the network. We all agreed that was because the network had been set up as a separate entity which was later absorbed into the company. Indeed, the original founders often complained about how 'corporate' the GT team had become. Their vision of the network was as an independent force that succeeded *despite* the company's policies rather than because of them. The absence of official knowledge sharing procedures had partly come about because of an informal approach that encouraged individuals to become 'experts' on certain issues. This could continue because these experts were happy to be could be contacted for information long after they had left the department.

A second topic relating to history was the fact that many of the locations had experienced significant changes which were sometimes driven by the business and sometimes due to external factors such as political upheaval. Thus, for a GT adviser to give the best level of support to a new Focal Point, they needed to be aware of that location's back story and this information needed to be passed on in a way that was

concise and relevant, without delving into unnecessary [and lengthy] details. The underlying effects of historical events can affect organisational behaviours. Indeed, Schreyogg, Sydow and Haltmann (2011) argue that organisational acts are widely believed to be historically conditioned. As noted earlier, when I joined the team, the norm was to have various people within GT who were fountains of knowledge on specific topics but their knowledge was never passed on to anyone else within the department. Mabel's point therefore was that historical context played a significant role in shaping departmental culture.

The notion of power and how it had influenced people's propensity to share knowledge in the department in the past was first raised in this session. We did not delve deeply into it until a later session, however it was interesting that it was mentioned at this early stage. Sally raised this point at the beginning of the discussion. Her perspective was that former GT staff had gained some element of indispensability by being experts on certain issues. She highlighted a situation where important interactions with a Satellite office were undermined because only one GT team member had any relevant knowledge of that territory. That team member's absence due to sickness led to a breakdown in communication between GT and the Satellite office. It also resulted in miscommunication between team members in that office and their local HR contact. Sally's point was that, on their return, the absent GT adviser, was heralded as the 'saviour of the day' for being the only person with the knowledge to 'fix' the issue – thus proving they were indispensable. Operating a team in this manner was clearly problematic. As will be examined in Chapter 4, the concept of knowledge as a source of power is well documented in academic literature on organisations. What was interesting was that Sally's comment was not based on an understanding of management literature but rather on her personal observations of organisational behaviour.

Action and evaluation:

It was not my intention to decide on immediate actions from the first meeting. I had intended for this session to be primarily exploratory. However, Sally, who is an action-oriented person, argued that a specific action was needed and she shared a technique

she had developed for gaining and storing information from Focal Points which became an action for the group to try out and evaluate over the next few weeks. The technique involved creating what we called a 'harvesting document' in Microsoft Word. Details relating to Satellite offices would be inputted into this document by the GT adviser. The information would be 'harvested' during on- and off-boarding conversations as well as during scheduled and ad hoc virtual meetings. Apart from Bryan, who could have face to face meetings with some of his Focal Points as his territory included offices in the country in which we were based, all advisers held virtual meetings via a special online meeting system. The meeting system allowed the adviser to share their computer screen with the Focal Point so that both parties could jointly ensure that correct details were being inputted. The new procedure we decided upon was for all advisers to use harvesting documents and then store the details in SharePoint. Harvesting documents could therefore be accessed and updated easily by any member of GT when needed. This was significant because it meant that new advisers had immediate access to knowledge about their locations. In addition, current staff working on other territories could keep abreast of developments in the entire network to have a broader picture of the network. Often GT members were called upon by HR and the wider business to share knowledge about certain aspects of expatriate policy, but the lack of sharing within the team meant that only the manager had a broad enough understanding to answer such questions. This new system would put an end to that. It also allowed members of our team to step in for colleagues who were on leave or unwell.

In the weeks following this session, the team began to use the harvesting document system. The implementation of the system was not without its challenges. This was not because it was particularly difficult – on the contrary, it was quite an easy system. The initial challenges could simply be attributed to teething problems relating to our varying levels of proficiency with SharePoint and a delay in making a mental shift towards better working practices. This is an issue that will be addressed extensively in the descriptions of subsequent discussion sessions. Evaluation in this study was ongoing. Although we specifically discussed the refining of techniques in our discussion meetings, we evaluated and tweaked the way we worked daily. This sometimes took the form of brief team huddles where we considered problems and potential solutions. Evaluating the success of the harvesting documents led to an assessment of how we

could structure our folders in SharePoint to avoid re-creating another Black Hole. We also looked more closely at using SharePoint for other documents that provided knowledge for the team.

After the first session, I reflected on our discussion and on the actions taken afterwards. I was impressed by the team's embracing of the open discussion forum and their willingness to examine our working practices. I was also encouraged by the fact that we had fostered a positive atmosphere for change. I did however have some concerns. Firstly, we had jumped too quickly to finding solutions and taking action. Sally proposed a new system within the first few minutes of the discussion and we grabbed hold of what seemed like a perfect solution and ran with it. The harvesting document was one of many actions that would contribute positively to the bigger change initiative, but it was important that planning, acting and reflecting took place as a holistic process based on a deep understanding of the roots of our problems. This would ensure that we would not lapse into old practices in the future. Indeed, the fact that we faced some hurdles in implementing it and in organising our folder system suggested that we had not dealt with some key underlying issues. In addition, it has been my observation that people in organisations are less likely to support a change if they don't understand why they are doing it. One of the difficulties of being a scholar practitioner in a group-focused action research project is finding the balance between action and academic consideration. From the team's perspective – and to a large extent, from my own perspective – the desire to 'do' outweighs the need to deliberate and reflect. I realised that I had to make a conscious effort to address this. Thus, I went into the second session with a view to delve deeper into the 'whys' and 'whats' of our problem.

3.7.2 Cycle 2

Our second session took place a month after the first one. Topics such as history and staff turnover were reiterated, however other themes were uncovered which would prove to be useful. I began the session by putting forward the consideration that we had rushed into action during the first meeting. It was clear that this was less of a concern for the team than it was for me. They saw the purpose of the study to be finding a

solution to our problem. This led to a discussion on our individual perceptions of this issue. Each had a different – but related – view of what exactly our problem was. Sally, stuck with the notion of creating a harvesting document as the solution to our knowledge deficiency. Rihanna considered the purpose of the study to be finding out why knowledge wasn't trickling down or being handed over effectively. Bryan and Mabel believed the solution to be linked to the problem. Bryan noted:

"I would sort of characterise it as on-boarding program and documentation of work processes. And I know that sounds like more of a solution than a problem, but I think that the genesis of the problem is that we cannot transfer the current knowledge to new employees due to the past state of on-boarding practices and maybe [we need] a systematic way of documenting the work that we do now. We cannot pass that on to anybody else very well." (Bryan)

This was typical of the kind of insightful contributions consistently offered by Bryan during our discussions. His comments often caused us all to stop and think and re-examine our perceptions. Following on from this comment, I posed some questions relating to what type of knowledge each team member would have liked to have received when they first took on their roles. The responses from the team highlighted some interesting themes.

Themes:

A key issue for all the team was the question of '*why we do the things we do*'. In other words, even the best knowledge repository and handover system is useless without an understanding of the purpose behind our work purposes. Bryan summed it up brilliantly when he noted that he'd been told he had to have certain conversations with certain stakeholders but he was given no reason why, and as such, he felt his knowledge was shallow at best and non-existent at worst. This accounted for some of his feelings of being ill-equipped to do his job in the early months:

“I think if I had understood roles, relationships, missions, responsibilities, then I could have a conversation about tasks. But trying to have a conversation about tasks before you understand roles, responsibilities and structure did not work that well for me.” (Bryan)

Similarly, Katherine noted that despite having had a relatively good handover because her predecessor was very efficient, she did not really understand why certain things were done. Her role included collation of statistics from the Satellite offices for the network’s annual report. In her opinion, some of these statistics added little value to the report and made the process of putting the report together cumbersome. The benefit of having an open discussion was that we could explain to Katherine how those figures accounted for the network’s contribution to the expatriate policy team. After this session, we were also able to devise a simpler method of collating data – using the harvesting document as an ongoing record of information.

We debated whether the team culture that Bryan, Mabel and I had witnessed when we initially joined GT, was an issue of knowledge hoarding related to staying relevant or important to the team, or simply a result of working in silos. Mabel noted that a culture of ‘insider knowledge’ meant that new staff often felt left out of the knowledge ‘clique’. This was not only socially alienating, but also unproductive when it came to having the knowledge to tackle basic tasks. It represented a way in which established members of the team could exclude newer members and keep them aware of how much they needed to rely on older members for information. Additionally, it ensured that certain team members were indispensable and basic functions could not be carried out without them. A simple example was the absence of any documented records about key locations; such as their community size, security warnings, school and family-related facilities and email addresses of Focal Points. This information could be found through various long-winded means; however, the quickest method was to speak to the adviser who handled that area. Often the adviser had a wealth of valuable information stored in their heads – and nowhere else. Thus, if a key adviser was away from the office, there was no quick referral source. Even more significant was the knowledge of HR policy relating to expatriates. Often, Satellite offices would ask questions relating to employees and their families, and the answers to these questions would depend on the company’s expatriate policies. Without a comprehensive understanding of these policies (and their

ongoing updates) new advisers struggled to guide the Satellite offices. Katherine and Rihanna joined the team after Bryan, Mabel, Sally and I had already begun to change the way the department operated, so they witnessed less of this behavior. They did however note that there was still an element of insider knowledge.

Katherine and Rihanna's feedback was valuable feedback for me, because as team leader, I had unwittingly become the person who had all the information and it was helpful to be reminded not to fall into the same trap as previous team members. This culture which prevailed in the past, could in some respects be attributed to different personalities in the team and individuals having different ways of working. In Chapter 1, I referred to a key member of staff being absent due to ill health in the early days of my tenure as manager. The absence of this person was the catalyst that led me to seek an urgent solution to the way we shared knowledge in the department. This individual had previously worked in a Satellite office and then become a GT member. They were therefore extremely knowledgeable. Unfortunately, their personal way of working was to keep things fluid and undocumented. What we learned from this was that irrespective of individual personalities, an organisation needs to have set standards of accountability that protect the team from being thrown into chaos by the absence of team members.

As we delved deeper into the problems of the department, Bryan highlighted an issue that affected the gaining and transferring of knowledge between GT and the Satellites. Simply put, the local offices operate in a relationship-focused environment. By its very nature, the job of supporting people during relocation requires soft skills like emotional intelligence, communication and empathetic problem-solving. By contrast, GT's work is more task-focused. It was our job to keep the network trained in the right technical skills, to promote company-wide rules such as IRM compliance and to give tangible added value for money. Thus, there was a disconnection between us and them. How does one glean information that will benefit the location and the rest of the network if one is asking questions that are disconnected from the daily experience of the Focal Points? For instance, a focus on statistics will not provide the richer detail required to understand what expats looking to move to a new location need to know. Bryan believed that finding advisers who possess a good balance between having a task and

relationship focus was key to addressing this issue. In his words; *'this is not an issue that can be fixed with SharePoint.'* The team generally agreed that Rihanna was best at managing stakeholders in the Satellites and HR because she was naturally a relationship-focused person. This gave me food for thought in terms of how our improved approach to knowledge sharing within the team could have a knock-on effect on gaining and sharing knowledge with the locations in the future. I have been informed that after my departure, this debate would inform the use of the Collaboration site which made knowledge transfer between GT and the Satellites much easier.

Action and evaluation:

A large part of this session (and subsequent sessions) was spent reflecting on and evaluating the processes involved in using SharePoint. As noted previously, different members of the group had differing abilities when it came to SharePoint. We each used it for different purposes. Katherine used it extensively for accessing information which had been inputted by the advisers for the annual report. She also used it to store articles for the quarterly magazine she edited. SharePoint is ideal for storing and sharing documents for easy access by team members. There is the capacity to have documents edited and/or updated within the application but this can be a long process. For Katherine, who needed to flick between up to sixty documents at a time, the system could be cumbersome and time-consuming. Some of us circumvented the problem by working outside of SharePoint and only storing final versions of documents. This created a problem because people were either continuing to use the Black Hole to hold documents until they were ready for SharePoint, or they were storing them on their personal desktops. Both approaches, if left unchecked, would put us right back at square one. This discussion led to some refining of the way we used SharePoint. After the meeting, Mabel helped us all with our understanding of how to open and edit documents in a more efficient manner within SharePoint. We decided that revising our methods of using SharePoint needed to be the action point for this cycle. It was agreed that eventually Mabel (or whoever held that role) would be the only team member to create logically-named 'metafolders' that followed a standard structure. The rest of the team was tasked with ensuring that our documents were removed from the Black Hole and our desktops and made ready for transition to SharePoint.

Personal reflections:

During this second session, I made a point of observing the contributions and reactions of the group to determine how their personal perspectives affected their approach to change, to this study and to knowledge sharing in general. As noted earlier, Bryan is insightful and reflective. He is positive but also pragmatic. Thus, his inclination is to consider every angle before committing to an idea. His thoughtful approach means that he sometimes raises points that seem to be outside the box but which eventually bring a refreshing perspective to the table. He has deep respect for information that is backed by scientific evidence or hard data. Thus, while he is not resistant to change, he will not jump straight into it without being convinced that it is of value. Sally has a less positive outlook than Bryan but she is also pragmatic and completely focused on solutions.

During the discussion sessions, we sometimes had to steer her away from trying to fix problems rather than thinking them through. This was both good and bad. It was good because she was one of the people who consistently brought forward ideas and who was most open to change and sharing knowledge. The downside was that jumping to solutions sometimes leads a person to treat the symptoms of a problem rather than the cause. Mabel is the most sensitive of the group in terms of her reactions to perceived criticism. She was most interested in how she could contribute to the study via the avenue of SharePoint. This was to be expected as she was the team's IT person. In later discussions, this love for the technology initially caused Mabel to take criticisms of SharePoint personally. The benefit of having open and honest discussions was that we could reassure her that the glitches in the system were not a reflection on her.

Katherine's approach to our study mirrors her approach to most work-related problems. She is inclined to see the negative and inherently believes that most organisational problems cannot be solved because they are endemic to companies or can only be solved with a lot of effort. The key was ensuring that Katherine could see that the effort involved in our change initiative was worthwhile for the good of the team. Lastly, Rihanna is a stickler for rules and hence while she could identify challenges, her approach was simply to adhere to a stated way of doing things. Rihanna was the team's newest recruit and thus, did not know of any other way of working besides the current exploratory system.

My personal approach to this project was complex because I effectively wore three hats – one as a manager wanting to create new and better ways of working, another as a researcher; and a third as one of the ‘experts’ in the team who needed to change my own working practices. Complexity is an expected aspect of the insider researcher’s journey (Coghlan and Brannick, 2013) but I had not anticipated the intentional actions I would need to make in order to change my processes. On a cerebral level I welcomed the changes – indeed I initiated them and believed in their value – but I still had to make a conscious effort to change. A further unexpected element that I had to address was the feeling of not being completely in control of the process. At this stage, I wondered whether a collaborative study could lead to us following too many potential avenues as each participant’s contribution had to be given careful consideration. This eventually proved to be unfounded as we came to a consensus on most decisions, but it was a definite concern as I reflected on the second session.

3.7.3 Cycle 3

This session took place a month after Session 2. Rihanna was not present during this meeting. In the weeks between the sessions, we continued to evaluate and refine our use of SharePoint and I encouraged the team to share their thoughts and problems with the group during ad hoc team ‘huddles’ in the office. Primarily, this meant that we all gained a greater understanding of what was going on in each other’s territories. This was designed to alleviate the problems that arise from working in silos. My reflection on the previous sessions led to me highlighting certain themes that had either been mentioned in passing or that been alluded to but not necessarily named. Two main themes were the culture of the organisation and power. Power had been referred to briefly by name but was an underlying element that summed up the behavior of previous GT staff. The practice of not sharing was clearly one that people in the team had become accustomed to and it was perhaps the fact that Bryan and I started our new roles at the same time and jointly wondered why things were done in this manner, that set the ball of change rolling. I began the next session by asking the team’s opinions on these key issues.

Themes:

Power and the related issue of knowledge hoarding were discussed at length in this session. I started the conversation by recalling Sally's comment about power from the first session, which had led to a discussion then and was resurrected in Session 2. The discussions had centred on some people's need to feel powerful by being fountains of knowledge. I suggested that this was a theme I had picked up on in both sessions. Everyone in the room except Mabel agreed. Mabel suggested that she could not remember hearing the specific term *power* mentioned in our discussions. Sally, Katherine and Bryan then explained that they not only remembered it, but strongly believed that power and knowledge hoarding were key characteristics of our departmental culture. Sally used the phrase '*people creating little kingdoms*,' which sums up the 'expert' culture. Katherine noted that as one of the newer employees, she had witnessed this, even among those of us who were trying to change this culture. We examined whether holding on to power was pre-meditated and deliberately negative, or simply a result of the nature of the network. As has been highlighted before, the network is staffed by people who move around the world with the company. It is an incestuous system where everyone knows everyone else and people who have been involved in the past, hold on to their connection long after they have moved on. For instance, when it was announced that I was the new manager of GT, a previous manager who now worked in a different department (and on a different continent) contacted me to give advice. This individual had apparently offered similar [unsolicited] advice to my immediate predecessor. Perhaps staying relevant to the network was the source of the desire to create these little kingdoms. On the other hand, there were moments where Bryan and I noticed that older team members kept newer recruits 'in their place' by reminding them that they were less knowledgeable than others.

Another potential reason for holding on to knowledge was pinpointed by Mabel. She argued that when a person is believed to be indispensable, their job is much more secure. There was an element of truth in this and indeed our team suffered during the absence of key team members whose knowledge made them invaluable to the department. Sally noted that a lack of trust or perhaps personal insecurity might have played a part in the absence of knowledge sharing. Mabel also considered individual

and organisational culture to be significant driving forces. Her assertion about individual culture refers to the extremely diverse nature of GT and the network. She believed that with so many people being used to different working practices, individuals may place varying levels of importance on knowledge sharing. While it is difficult to gauge the effect of individual (and/or national) culture on this specific situation, it is easier to recognise that the culture within GT had allowed 'little kingdoms' to flourish. Bryan raised an interesting point that I later found to be backed up by Ford's (2008) article on disengagement and knowledge hoarding. He argued that none of the above considerations were to blame for his personal failure to store or share knowledge. Often, he simply did not place information in a repository because he prioritised other activities higher than knowledge sharing. Following is an excerpt from an exchange between Bryan and Mabel on this topic, which resulted in a best practice sharing moment:

Bryan: *For me, honestly, I think I don't document as much stuff as I might, because it takes away from other activities. And it's really that simple. And obviously, that has a negative impact on transferring knowledge.*

Mabel: *It's an investment. It's a time investment.*

Bryan: *It's an investment, right! If knowledge is managed in an efficient way, then I'm not certain I get out of that investment what I put into it.*

Mabel: *Yeah, but I think what the issue is, is short term results or long term results. If you're storing knowledge and you're sharing it amongst your co-workers or the network, then that's a long-term vision. And the short term is 'yeah, I know how this is done.' And then you have to hand over your role [and you have nothing to share]'*

Bryan: *It's short sighted.*

Mabel: *Yeah, and then you're in trouble because you need eight weeks of handover instead of one month. Because all the knowledge is here [points to head as in knowledge is stored in people's minds].*

Bryan: *Well, the trick about documentation is, you lose 30% of the knowledge in the first 24 hours. So, if you had a phone conversation, you're like 'I remember pretty much all the important parts of the conversation.' And I'll go ahead [and think] I have some time on Friday - I'll write it down [then]. That does not work.....*

This exchange caused Sally to suggest that Bryan (and others) adopt an approach she used regularly. She kept a Word document for each of her Satellite offices. During conversations with Focal Points, she made notes to update the document, then sent an email with details of the conversation for their confirmation. She then updated the info in SharePoint straight after the conversation. This meant she was only dealing with the document once, rather than coming back to it later and running the risk of losing information. This became a suggested best practice for the advisers and would eventually be incorporated in training for new advisers.

Action and evaluation:

The rest of this session focused on two key elements. Firstly, we discussed what we each would have liked to have received in our handovers, which would inform the structure of handovers for the future. Secondly, we spent a significant portion of this session evaluating SharePoint. The handover discussion was mainly useful in that it led to us considering the best structures for folders in SharePoint to ensure that we did not end up creating another Black Hole. The idea was that a new staff member who walked into a new role, should be able to find out as much as possible about their role in an easily accessible format. A key point that came out of this was that while Mabel, Katherine and Rihanna had jumped straight into using SharePoint and Sally was halfway there, Bryan and I acknowledged that much as we saw the benefit of SharePoint, we still needed to make the mental shift to use it correctly. As Bryan put it:

'I think to some extent we've already done a bit of that circle. We've created SharePoint, we've sort of dealt it out a little bit and played with it and seen how it fits into our current practices. I'm not doing it. I cannot speak for other people, I'm not doing it the way that it

could be to its potential but, it's still clear to me that it's the way forward. I just haven't adapted my work practices to it yet.'

At the end of this session we decided on three actions points. The first action was more of an active reflection. I asked everyone to reflect on SharePoint over the course of the next few weeks and give their feedback on what they felt was working well and what needed to be adjusted. The second action was for Katherine to create a document within SharePoint which could be populated with details from the advisers for the annual report. This would change the way we had previously produced the report and could potentially make the process easier. Lastly, we agreed that to fully evaluate the effectiveness of SharePoint, everyone needed to use it in the right way. Thus, our task was for every team member to use the application consistently and accurately for the next month.

3.7.4 Cycle 4

Over the course of the next four weeks, the team tried to use SharePoint more consistently. Definite improvements were made in terms of how efficiently we used it, however it was clear that we still had a little way to go. The residual effect of the open and honest sharing sessions had however created a very positive change in the team dynamics. Sharing knowledge verbally - including thoughts, problems and solutions - became the daily norm in the office. This not only led to greater camaraderie but also established a culture of jointly solving problems and collectively understanding how knowledge gained or created by one team member, could potentially help others to do their jobs in a better way. We had introduced various new ways of working with the Satellite offices; which while not strictly linked to this study, involved more open discussion and knowledge sharing. One such initiative was virtual mentoring sessions facilitated by Sally and I, where experienced Focal Points could pass on knowledge and help less experienced colleagues find solutions to problems. This, alongside more frequent and informal communication with the international locations had greatly improved our relationship with the network. I went into the fourth session wanting to

reflect on what we had done so far. Primarily reflecting on SharePoint, but also on the entire process of the study and how far we had come.

Themes:

In the fourth session, the team was given the opportunity to openly discuss their opinions on all aspects of our drive to change our working practices and to reflect on what we had done so far with regards to managing and sharing knowledge. Katherine began by stating that in comparison to the handover she had received, she believed that SharePoint would now allow her to give a more comprehensive handover to her successor. She also noted that SharePoint was just one piece of the puzzle. We had introduced various measures like the mentoring circles and more open and frequent discussions between the advisers in GT. In her words, there was no one '*silver bullet*' that changed things – the general focus on improving knowledge management was what mattered. We all agreed that the success of this project could partly be attributed to our joint desire to improve GT. This led me to question whether things could ever go back to the old ways if a new set of people who had less of an interest in advancing the team and more of an interest in individual power took over our roles. Three interesting themes were highlighted here. Organisational culture, leadership and the time it takes for different people to adapt to change. It should be noted here, that culture as referred to by the team simply covers the way things have traditionally been done in GT and the wider organisation. The team's consensus was that the new culture of the department would become entrenched such that newcomers would know no other way of doing things:

'To me, it's pretty concrete. You build an organisational culture around one thing – professionalism. We're going to have reasonably high expectations of behaving like grown-ups and the work that we do is important. And you can capture that within information management, so that if I leave, there's still a predominant organisational culture that we take our work seriously, we have a place that we can store things, we don't hoard information. So, I think there's a piece of it that is structural and problem-solving, and there's another one that's a cultural value within the group. And for both of those, it

does not really matter that much if one person leaves, because both those problem-solving structure and cultural value remain.” (Bryan)

“If new team members come in and that's how they're encouraged to work, then going back to sitting with a pile of papers in your drawer, with only you knowing who anybody was....well that time's gone.” (Sally)

According to Rihanna, this organisational culture would be driven by leadership and if senior leaders actively show their backing for maintaining this culture, it should remain intact:

“...it is the leadership, you see. Because if the leadership and the vision of the leadership changes, then it forces [change]. Let's say that the value that we deliver here is not measured in the way you are measuring it, then we will have to change our habits to show that we're adding value in the way that they possibly will measure it. And so because of that, behaviour will change. It's always like that. Let's say if we have other stakeholders that advocate for it as well, let's say [senior managers] that say, this is the way we do things. And then that continues, so it's like a cycle of how everybody promotes it in their lifespan within that role, and then when they move on, that will keep it alive. But not if it's just the GT Manager.” (Rihanna)

What I found interesting was the acknowledgement that despite us all being proponents of improving our approach to knowledge sharing, we had not considered the time it would take for us to actively invest in changing our ways of working. From my own perspective, this was primarily a result of consciously needing to make time to change. Not using SharePoint as I should, was simply because it was not the easiest option, however it was clear that once we forced ourselves to make a habit of it, this was the most productive option. Bryan summed this up perfectly:

“For me, there's a real time in adapting the new processes and technology to your daily work routine. And for me, that was months before I started. You know, okay, I understand the concept, I understand how it works, I see that it's good, there was no resistance. But

really integrating that into what I do every day, putting notes about my locations and updating changes and things like that. Forming new habits is not a given.” (Bryan).

Indeed, as we later discussed, it took just as long to talk about inputting information into SharePoint as it did to do it, but once it had been done a few times, it became a natural step in our daily processes. A natural step did not however equate to it being an easy one. The rest of this session was spent evaluating the problems with SharePoint and looking at ways to make it more user-friendly. At this point, we did not believe that SharePoint was the best application in terms of ease of use but as has been noted earlier, the benefit of open discussions is that previously unknown solutions to problems can be explored. As we discussed the issues, it became apparent to Mabel that the difficulties we had experienced with SharePoint came from our inability to use it correctly. A key learning point here was that none of us had been proactive in seeking technical help and this had held us back. Mabel had been struggling to understand why despite her hard work to push SharePoint as the answer to all our problems, it wasn't being used as it should be. This discussion revealed the answer – we needed more training on using the application. Katherine and Bryan pointed out that Mabel's initial feelings of sensitivity about our feedback were misplaced. We as users were to blame for not putting our hands up and confessing that there were gaps in our knowledge. As I noted:

“Where I have gone wrong is when I've gone into SharePoint and I haven't known what to do or I haven't done the right thing, I haven't then told you. I've just gone away and I've thought “I couldn't do that. I'd rather work in My Documents.” Which is not productive. I should have said, “Yeah, if you know how to do that, how do I do it?” (Effie)

A further point to note was Bryan's assertion that the process of adapting to using SharePoint consistently would have been quicker for him if he'd been 'pushed' to use the system. This led to some debate as to whether he would have potentially pushed back against a strict enforcement. There was perhaps some truth to his assertion. The downside of jointly discovering a way forward and allowing people to come to their own solutions is that those who are less inclined to action may not move with urgency unless they are forced to do so.

Action and evaluation:

At the end of the session, I asked the team to fill out a brief questionnaire to get their views on SharePoint as a tool and on our knowledge management project in general.

The survey questions were as follows:

1. So far do you find SharePoint to be an improvement on previous ways of sharing knowledge in GT? – Yes (briefly explain why) – No (briefly explain why)
2. What challenges do you face when using the GT SharePoint site?
3. What are the benefits of using the site?
4. What would you change about our current knowledge management systems?
5. Please give your reflections on how the process of talking about knowledge management has influenced your view on the subject within the context of GT

The answers given to the questionnaire mirrored our discussions about the technical challenges we had faced with SharePoint. In general, the team members considered the new system to be an improvement on what we had before. Katherine and Rihanna had only ever used the current system but they were aware of the previous problems we had experienced as the legacy of the old system still existed when they joined the team. The team's reflections in answer to Question 5 gave a good insight into how important the open discussion sessions were in helping people understand the importance of knowledge sharing. For example:

"I think it shows me how well I understand or at least appreciate the system but also how far I need to go – as well as the team. I think talking about it really helps to warm everyone to the idea about how there are much better ways of working." (Katherine)

"For me the first part was to understand the scope of the problem and its consequences. That motivated the team to talk about solutions and ideas both in technology and work processes. Following that, knowledge management became a component of many diverse conversations about how we work." (Bryan)

"[The benefit] is that it requires stakeholders to see value in it and request for the usage as a standard operating procedure." (Rihanna)

Mabel and I discussed the feedback about people's technical challenges with SharePoint and about three weeks after the fourth discussions session, she ran a special SharePoint workshop where we covered various aspects of using the application. We discovered that while the system was not perfect, it had many redeeming features and there were definite ways to make the system work for us rather than against us. With a better understanding of the system and a greater inclination to ask for help when needed, sharing knowledge via SharePoint was successfully entrenched in our daily working practices. In addition to this, though separate from this study, knowledge sharing with the wider network was significantly improved through the collaboration site. Due to my impending departure and various projects the team were involved with, there was a gap of two months between the fourth and fifth sessions. In the intervening weeks, we continued to refine our use of SharePoint such that we could move any residual files out of the Black Hole and create an efficient structure in SharePoint. This made sharing my knowledge with my successor extremely easy. The team continued with the practice of open discussion and sharing knowledge on an informal basis. They also chose to adapt our weekly team meetings to ensure that knowledge shared could be used effectively.

Personal reflections:

Bryan's comment about the difference between being pushed to do something or being part of the process of change, gave me food for thought. I chose this as a topic of discussion in the final session. I questioned whether the benefits of collaborative change-making outweighed the time and effort involved. With hindsight, I was nervous about the time element as I my departure from the team was looming. If simply being told what to do might achieve a desired outcome in an organisation, was it preferable to understanding what had gone wrong before attempting to put things right? As I pondered this however, I reminded myself that a key purpose of the study was to increase engagement by encouraging the team to be initiators of change. Without a doubt, this was one of the positive outcomes I had witnessed. Team spirit, a universal willingness to share and an increased interest in what we did and how we did it had

greatly improved our attitudes and working environment. The mental and technical hitches related to working with SharePoint could all be addressed over time.

3.7.5 Cycle 5

I went into the final session with the aim of considering each person's perspectives on how their personal biases and assumptions had affected our project. We also looked at the process we had been through as a team to come to this point in our knowledge management journey and we considered what this meant for the network. Sally was not present during this session and Rihanna was only present for part of it. We also had a guest participant; my successor Barbara who joined us as an observer. Many insightful comments were made during this session which were not strictly connected to the topic of knowledge management but which highlighted some of the contributing factors to the original problem.

Themes:

All the themes that were discussed in this session had been raised in previous sessions. An additional element relating to organisational culture was of interest to me. We had always assumed that the unique nature of our network's set-up was one of the root causes of the knowledge sharing problems that existed in our team and this had been evident in the discussions during previous cycles. In addition to this however, we noticed that the wider organisation did not have an optimal knowledge sharing system either. This is understandable as the organisation is huge. At the time of the study it had ninety thousand employees worldwide. It has a complicated structure that means that there are different national divisions of the company and different departments within these divisions, as well as global departments that oversee the different functions. Each division manages its own knowledge stores and while it is possible to access information at a global level via the intranet, it can be difficult to find accurate, up-to-date information because there is no uniform structure. Some departments have extremely well-maintained, timely information, while others have accurate information that could not be found because they were stored under obscure headings. Katherine

noted that in her role, this difficulty in accessing information at the company-level was almost as frustrating as the difficulties at departmental level. Indeed, she noted that perhaps one of the reasons why previous incumbents of our roles had not addressed this issue was because there were no fixed guidelines. As far as our department was concerned, we re-iterated the issues of job security, knowledge hoarding and the power of being an expert in one's field.

Prior to examining how our individual biases affected our approach to the action research process, I decided to re-examine Bryan's assertion from the fourth session about the pros and cons of enforcing a new system versus the method we had chosen. There were mixed views on this. When asked if being 'ordered' to make changes would have been preferable to taking time to discuss, understand and reflect on our problems, Bryan was ambivalent:

'I cannot entirely rule that out. I mean there are obviously best practices in the industry for how knowledge transfer needs to happen and two completely different approaches. Us working out a way to make that happen for our organisation or some external person stepping in and saying perform these tasks and your knowledge transfer will be great. I don't know! I honestly don't.'

Mabel had a different perspective. She firmly believed that taking the time to think about our parameters and to decide which elements of our team's problems we wished to solve made a difference to her way of thinking about these issues. She also believed that the sessions had inspired her as the IT focal point to expand her knowledge and information management beyond our team, to include the wider Satellite network community. Mabel did indeed go on to create a community collaboration site and helped other teams in HR to clean up their use of SharePoint. In her own words:

'This has inspired me to have a better understanding [of] why we need this and the 'why' is usually very important, especially, when you do change management.'

Katherine noted that there were pros and cons to our approach but found the process to be useful overall because of the need for people to understand *why* they should change

their patterns of behaviour. She gave an example of experiencing an IT change initiative while working in a different department. The method adopted in that situation was one of 'external force' rather than finding a democratic solution through open discussion. To her mind, that approach had significant challenges because of a lack of understanding of the 'why'. Very few people had any idea what they were doing or why they were doing it, even though to all intents and purposes, they had made a transition by the allotted deadline. Yet, the benefit of that approach was that it was quick and did not rely on an individual's ability to motivate themselves to change. To Katherine, the decision as to which is approach is more fruitful would be dependent on the team's ability to incentivise themselves to change.

I understood Katherine's perspective because as will be shown later, an enforced system would fit in better with her personality. In my opinion however, what would be missing from such an approach would be the empowerment of the team and their personal 'buy-in' to the change process. Or as Mabel put it, *the understanding of the 'why'*. Rihanna later noted that a mixture of the two approaches might be best to bring a sense of urgency but to allow for customisation to suit a group's needs. Rihanna had to leave the session to attend another meeting so she did not contribute to the next discussion about how our individual biases affected our approaches to the AR study. Katherine noted that the three team members who gave their perspectives on this topic were all task-oriented individuals. This did not stop them each having different perspectives on our change initiative. As noted previously, Katherine has a 'can-do, will-do' attitude and had the benefit of joining the team when we had already started using SharePoint. She found the sessions and the new way of sharing useful and empowering, but she gave an amusing description of her frustration with the time lag she witnessed in other people's uptake of SharePoint. She argued that her need to simply 'get things done' outweighs the need for over-thinking processes:

"That particular aspect of my personality is one of the reasons why for example, I don't understand why people are still putting stuff in the Black Hole. We've said we're not putting stuff in the Black Hole anymore. I think it was September when we first we talked about how we'll all move our stuff over to SharePoint. Then I get an email which suggests not everyone's doing it and I'm like, 'I'm sorry, did I miss something?'" Because I moved all

my stuff over months ago. So, from my perspective, I look at people and I think, 'why cannot you do it my way?' It's obviously the best way. But I do have to pull myself away from that, and I find myself doing that sometimes. But, I think with knowledge management, within GT, it should be a more concrete thing, like you flip the button on and say; 'we're now working in SharePoint, no longer the Black Hole'. For me it's quite a clear thing but it seems it's not that way for everyone. Either we're working with SharePoint or we're not working in SharePoint. So, yeah, absolutely my view of the world and how I do things changes how I look at that, but with knowledge management I think I do things more concretely." (Katherine)

The discussion shifted to how we would pass on knowledge in the future – particularly with regards to handing over to our successors. Bryan had often spoken about the difference between people who approached work from a task-oriented perspective and those who had a more relationship-focused approach. He considered himself to be more of a task-focused worker and as such he suggested that he would always be inclined to create onboarding structures that simply outlined the tasks required of a role. He however noted that the success of the expat support function often hinged on building good relationships with stakeholders. Thus, while his strong personal belief was that our knowledge transfer systems should give a thorough understanding of required tasks, he wondered if there was a way to incorporate the more human elements of the role.

Mabel noted that her role had changed significantly due to the increased importance that information management had been given in the team. This made the prospect of handing over her role to be difficult. Indeed, Mabel's role had begun as the keeper of the network's website and the person responsible for the old client database. The change to a new database and her subsequent leading role as the SharePoint expert for GT required a new imagining of how she would handover to a successor. As a self-confessed 'data nerd', Mabel later went on to create video tutorials that made the use of SharePoint and the accessibility to knowledge much easier for the team and the network.

A final point to note from this session is that I have previously examined my own biases about choosing the AR route to solve our organisational problem however I had not – until now - examined how my biases affect my approach to knowledge transfer, or indeed to the role I was in. During our discussion, the topic of the future of the network was raised and I realised that my desire to improve the system had its roots in my impatience with the ethos behind the genesis of the network. I did not see any need to create kingdoms or keep oneself linked to the network because for me, international mobility is simply a part of modern life. For others, the network provides some element of stability (and I daresay importance) in what can be a chaotic life of constant upheaval. For them, staying linked to the network underlines this sense of importance.

3.8 Further reflections and observations

As a researcher, one of the most interesting aspects of this study was the human element. The human element refers to the perspectives and personality traits that underpin the reasons why people do the things they do. It also refers to the simple fact that no change initiative – or knowledge management system - will work without the cooperation of people. Mabel rightly stated in one session that SharePoint is all well and good, but only if people are *actually using it* for the purpose for which it is intended. Similarly, Katherine gave an example that reiterated Bryan’s suggestion that sometimes knowledge hoarding may not be about power. It might simply be that the process of recording knowledge is just too difficult. Our early frustrations with SharePoint can attest to this. Successful knowledge management does not stand in a vacuum. Our discussions suggest that various elements must come together to limit the tendency towards knowledge hoarding. Ultimately people sit at the centre of these elements. The existence of a high-tech IT system, will not make a difference. People and culture make the difference. An organisational culture of team engagement; where nothing is gained by being the sole expert, provides fertile ground for knowledge sharing. As Rihanna suggested, leaders who promote such a conducive culture are equally important. Knowledge should not be such a source of power that holding on to it provides job security. An organisation’s approach to knowledge and what it stands for, is also fundamental to organisational culture. Bryan noted that when he initially joined the team, the absence of a good knowledge management system caused him to believe that

knowing about his role was not important. He believed that if something is not taken seriously, then perhaps, that thing does not really matter.

In considering the role of people, one of the lessons I learned from this study is the importance of allowing for the time it might take for any significant change initiative to take hold. This is not just about logistics, timing or technical glitches. It is also about the cognitive understanding of an idea. Bryan alluded to this when he suggested that forming habits takes time. Mabel describes a different aspect of this in relation to people needing to build a foundation of understanding before moving on to something new:

“When I started SharePoint in our team, I really needed time to work with you, and you needed time to get used to it. And you also needed time to get familiar with SharePoint, get comfortable with SharePoint, and see the benefits of SharePoint. And once that started to grow on our team, eventually, I initiated the collaboration site. I think [this is] the order of things. If we would have done it all at the same time, or maybe first a collaboration site when we were working from the Black Hole - you know, that wouldn't have worked. So now you're comfortable with working in our own GT site, and when the Satellites need some help with the collaboration site, you're very comfortable with SharePoint. You know the look and feel, and you're more equipped to assist your locations as well. So, I'm glad about that, about the order of things.” (Mabel).

3.9 Emerging themes and next steps

An analysis of the discussion topics from the five sessions revealed emerging themes relating to the causes of (and potential solutions to) our knowledge problems. We had discussed at length the problems of the network, bearing in mind that we had no control over issues such as staff turnover. During the sessions, I had begun to look at the literature relating to power and knowledge transfer, as this theme was mentioned quite early in the process. Once the sessions were completed, I took a deeper look at this, as well as other themes such as knowledge hoarding, trust, organisational culture and leadership. The next chapter examines literature in the field of knowledge transfer in relation to these themes.

Chapter 4 Review of literature

4.1 Introduction

The following chapter seeks to situate this study within the academic literature concerning knowledge management. As outlined in Chapter 1, the Action Research (AR) project began as a means of addressing an organisational problem relating to a lack of knowledge sharing within the team. Chapter 3 described the cycles of action and reflection that took place over the course of several months within the Global Team (GT). Various themes arose from our discussions, actions and reactions that required a deeper understanding of the factors that affect knowledge sharing both positively and negatively. Thus, a targeted study of specific literature in the field of knowledge management serves as a means of understanding what conditions enable this kind of problem to grow, and what conditions need to prevail in order to address the issue. The literature review also helps me as a researcher to determine how my study aligns with knowledge in this field and provides a foundation for evaluating the results of the AR project.

This chapter will begin by defining some key concepts within the field of knowledge management that relate to this study. It will then consider themes that arose from the AR process. Literature examining the factors that affect knowledge sharing such as motivation to share and the culture of the workplace will be considered. Lastly, a look at the role of leadership will be undertaken as this was also identified as a contributory factor to knowledge sharing within the team.

There are some key points to note about this study, which influenced the direction and scope of the literature review. Prior (and unconnected) to the study, a new client information system was launched which allowed the team to share basic data about employees with the Satellite locations. This platform sits within Microsoft SharePoint, an application widely used across the company. As part of the team's increased focus on knowledge sharing, a separate SharePoint site became a platform for storing information and sharing knowledge and insights. Having an information repository is

useful for any team and indeed much of the literature in this field centres around IT solutions to managing knowledge; however, a knowledge management system is only as good as the people who use it. They need to be receptive to using it, *actually use it*, learn from it and contribute to it. Schank and Childers (1988, cited in Garvin, 1993, p.10) note that:

“It is very difficult to become knowledgeable in a passive way. Actively experiencing something is considerably more valuable than having it described”.

Similarly, Hendriks (1999) argues that the existence of IT repositories does not necessarily lead to increased knowledge sharing as these systems are not always used to their full potential. Various authors (Duan et al, 2010; Argote and Ingram, 2000, Ipe, 2003; Szulanski, 1996; 2000) highlight the critical role that people play in the success of knowledge transfer. These writers suggest numerous people-centred factors such as organisational culture, recipient-source relationships, causal ambiguity, language and distance that affect the transfer of knowledge.

Thus, the main area of study for this literature review is the role of people in the sharing of knowledge. This focus is because of the underlying issues that became apparent during our Action Research (AR) project. Although Sharepoint played a pivotal role in the changes that were implemented, I was less interested in information storing and more interested in knowledge, learning and the improvement of the team. The breakdown in various aspects of the department was not about the lack of a place to store knowledge – or indeed about how to use a repository. As our discussions and actions progressed, it became apparent that once the team members overcame the various barriers to sharing, they were happy to use the repository. Sharepoint is not a perfect application and some of the actions identified in our discussions involved refining the process of using the system, however, the team’s propensity to use it and improve upon it was based on people-centred factors.

Simply put, the answer to the question – *‘how can we store knowledge once it is shared?’* – can be found in the use of Sharepoint. What I needed to understand from the literature

was: *what was causing the barriers to sharing in the first place?* Following on from that, what factors hindered those who found the new way of sharing difficult to adjust to? Is there an underlying rationale to how executives learn and share? And what causes them to hold on to knowledge? This review therefore pays greater attention to such factors than to IT solutions, even though IT is a key area of study in the extant Knowledge Management literature.

Knowledge Management, (KM) Knowledge Transfer (KT), Knowledge Sharing (KS) and the various concepts relating to them, are widely covered in management literature (Spender and Grant 1996; Argote et al, 2000; Grant and Grant, 2008). Indeed, Alavi and Leidner (2001) highlight the increasing emergence of a knowledge-based perspective of the firm within strategic management literature. Given the broad range of available literature, this review is out of necessity quite selective. As noted previously, the focus is on topics that arose during the action research phase rather than a general look at KM/KT/KS - otherwise the scope would be too broad. It was essential to identify the topics that emerged from the discussions before conducting a literature review – firstly because of the broad nature of KM and secondly because not all KM-related literature was relevant to the departmental issue at hand. For instance, much of the extant literature examines knowledge sharing/transfer between different units in one organisation or between related but separate organisations. Our focus however was on knowledge created and shared within one department. There are many lessons to be learned for our group from studies that consider the sharing of knowledge from one department or organisation to another, however these kinds of transfers possess dimensions of complexity that do not exist within a team - such as; differences in departmental and organisational cultures and competition between units or companies. Knowledge transactions between departments and organisations may also be missing the subtle nuances of smaller team dynamics and departmental power-play. Based on the AR discussions and my observations of the team, the key issues that this study will explore are those relating to the relationship between source and recipient, power, trust, knowledge hoarding, organisational culture and leadership

4.2 Defining key concepts

The following sections simply define some key concepts within the literature on knowledge which are pertinent to this study.

4.2.1 Knowledge

It behoves us at this point to distinguish between knowledge and information.

Gammelgaard and Ritter (2000) define knowledge as:

'.. a combination of experience, values, contextual information and expert insight that help evaluate and incorporate new experience and information.'

Al Alawi et al (2007) argue that knowledge is much more than just information stored in repositories. They suggest that knowledge makes a home in people's consciousness, and after some time, their actions and behaviours reflect this knowledge. While examining how organisations go about managing what they know, Davenport and Prusak (1998) provide a comprehensive distinction between knowledge, data and information. They highlight the fact that failing to distinguish between these three terms can lead to unproductive (and expensive) outcomes for organisations intent on finding a better way of managing knowledge. They are careful to acknowledge the fact that on a philosophical level, there are many distinctions and 'higher order concepts' that can be ascribed to the word 'knowledge', however it simplifies matters to combine concepts such as *wisdom* and *insight* into the overall notion of knowledge. I am inclined to borrow from this approach for the purposes of this study, because delving deeply into the minutiae of the concepts behind knowledge will broaden this review without adding any significant value to the purpose of our study.

Thus, Davenport and Prusak (1998) consider knowledge to be:

'a fluid mix of framed experience, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information.'

Data on the other hand is described in this book as a '*set of discrete, objective facts about events*' while information is seen more as a '*message*' of some sort. Messages are converted into some form of communication, and are designed to alter the way the recipient views or understands something. Data is therefore elevated to become information if it brings meaning to a recipient. Indeed Roberts (2000) considers information to be data that has been arranged into a meaningful pattern but she suggests a simpler view of knowledge as the '*application and productive use of information*' (p.32). I would add that information is simply facts presented to enlighten a recipient while knowledge has the added element of cognitive awareness of information. This cognitive awareness may be gained from a deep understanding of information – for example the way a child learns and understands mathematics at school – or it could be based on learning from personal experience without necessarily being taught.

As knowledge and the most conducive conditions needed to share or transfer it are the focus of this study, the next section of this review will delve deeper into the concept of knowledge and particularly into the type of knowledge that is transferred in organisations.

4.2.2 Tacit and Explicit Knowledge

Rarely does a discussion about knowledge and learning take place without the mention of the work of Polanyi. The often-quoted phrase "*we know more than we can tell*" (Polanyi, 1966, p. 4) is the starting point for an examination of the concept of human knowing and the space between tacit and explicit knowledge. Tacit knowledge is that element of knowing which we cannot fully express to others while explicit knowledge can be more easily articulated and formally presented. Grant (2007) notes that contrary to the way Polanyi's work is generally quoted in management literature, he is not providing a theory on how to convert tacit knowledge into explicit knowledge, rather Polanyi is considering the nature of 'knowing' and the continuum between tacit and explicit knowing. Similarly, Inkpen and Dinur (1998) argue that tacit and explicit knowledge are not rigid opposites but should be considered as two poles at either end

of a spectrum. Tsoukas (2005, cited in Ribeiro 2012) raises a slightly different perspective in which there is a tacit and explicit element to all knowing, making them 'two sides of the same coin'. This is an interesting take on the composition of knowing. It suggests that rather than a distinction between '*know-how*' and '*know-what*', the two elements of knowing are intertwined. This makes sense within the context of organisational knowledge, where the act of performing a task is based on inherent knowing - ie; *know-how* - and executed with the ability to do the task - ie; *know-what*. As Polanyi (1969) himself states: '*explicit knowledge must rely on being tacitly understood and applied.*'

Tamer et al (2003) note that tacit knowledge may be held by individuals or by groups. In organisations, collective knowledge may grow from organisational culture or shared experiences. An example often used when speaking of tacit knowledge is the difficulty in passing on a skill. A gifted opera singer can teach a protégé the mechanics of singing but would be unable to pass on the nuances that come from innate talent and learned experience. The success of such a venture would be affected by the student's receptivity among other things. Foos et al (2006) note that '*learning knowledge that is tacit in nature requires participation and doing.*' Similarly, Polanyi (1966) argues that even while using practical experiments to teach a pupil, one can only rely on the pupil's "*intelligent co-operation for catching the meaning of [such a] demonstration*". Thus, for organisations, the ability to recognise valuable tacit knowledge, codify it and create conditions where receivers of this knowledge can assimilate it is crucial.

The work of Nonaka (1991; 1994; Nonaka and Takeuchi, 1995) underlines the importance of the difference between tacit and explicit knowledge when considering knowledge within organisations. Nonaka and Takeuchi (1995) took the concepts of tacit and explicit knowledge and raised the question of why many Western companies had not succeeded in creating, transferring, and adapting knowledge and innovation in the way that Japanese organisations like Toyota had. Nonaka (1991; 1994) suggested that the process of sharing tacit knowledge and turning it into explicit knowledge is key to long-term organisational success. Proposing the SECI model of knowledge transfer, he suggested that tacit knowledge stored in the minds of workers in an organisation needs

to be shared with colleagues or other teams via a social process. The socialisation model is shown in Figure 4.1 below (adapted from Nonaka and Takeuchi, 1995)

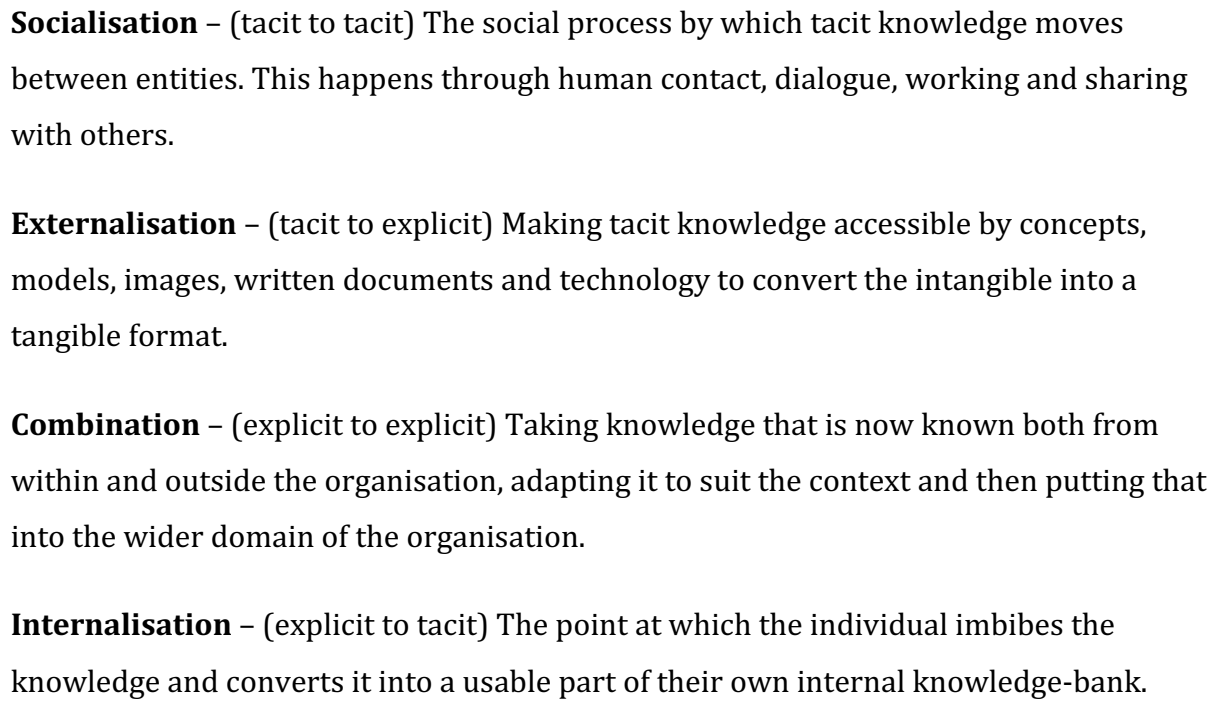


Figure 4.1 – SECI model (Nonaka and Takeuchi, 1995)

This social element is one of several aspects of tacit knowledge highlighted by Ribeiro (2012), in an action research study of a Brazilian nickel plant. The concept of *collective tacit knowledge* is of interest to my study because it considers the importance of social context. Knowledge in this perspective is socially situated, so workers in a group are collective owners of tacit 'know-how' and developing knowledge is related to being part of the group and adopting the way things are done. Interestingly, based on his study, Ribeiro (2012) puts forward the idea that there is no such thing as explicit knowledge. For him, codifying knowledge in some form (eg; books, IT systems, manuals etc) does not make the knowledge explicit. The books etc are just a medium for articulating the tacit knowledge held by individuals or groups. While this is an interesting viewpoint it seems to be playing with semantics. One could argue that codifying tacit knowledge turns it into *explicitly expressed* knowledge and what we choose to call that is open to interpretation. What is less contentious is the importance of the social context of knowledge. This leads to the consideration of what elements within the collective affect

how knowledge is shared. Prior to doing this however, it is important to consider two key terms – knowledge transfer and knowledge sharing.

4.2.3 Knowledge Transfer/ Knowledge Sharing

Wang and Noe (2010) highlight the need for organisations to find effective ways to transfer or share expertise from those who possess it to those who need to learn. For the purposes of this study, the terms Knowledge Transfer (KT) and Knowledge Sharing (KS) are at times used interchangeably, however in general it is the *sharing* of knowledge that is being considered. The reason for the use of both terms is that in the context of the team being studied, transferring knowledge does follow on from sharing. Paulin and Suneson (2012) discuss the terms knowledge sharing, knowledge transfer and knowledge barriers and note that the distinctions between sharing and transfer in the knowledge management literature are blurry. They cite scholars like Jonsson (2008), Liyanage (2009) and Riege (2005; 2007) who use both terms to mean the same thing and further note that the definitions given in Shwartz' (2006) Encyclopaedia of Knowledge Management still leave questions about the meaning of these terms. After reviewing the literature on these concepts, Paulin and Suneson (2012) suggest that authors who use the term KS are often considering the movement of knowledge between individuals, while the term KT is often used in reference to groups and businesses. Argote and Ingram (2000) support this view. They define KT in organisations as:

'the process through which one unit (eg, group, department or division) is affected by the experience of another.'

The effect of the transfer of experience according to this definition should be a change in the performance of the recipient. This is similar to Alavi and Leidner's (1999) view of KT as the formal or informal flow of existing knowledge within a group or organisation with the end goal of enhancing performance. Argote and Ingram (2000) acknowledge that the possibility of being affected by the knowledge of another entity also applies to individuals, however they see the organisational problem of transferring knowledge to

be greater than a simple knowledge transaction between a few people. This is true; however, it would be unwise to overlook the significance of the individual's mind-set in the process of transferring or sharing knowledge - particularly when considering smaller groups such as the unit in this study. Indeed, Spender and Grant (1996) note that individuals operate at the heart of organisations and they are the original holders of knowledge. Nonaka (1994) in turn suggests that it is the knowledge held by individuals that is scaled up to different levels of the organisation for the company's progress. Ipe (2003) defines KS as '*the act of making knowledge available to others within the organisation*' and she makes the point that the diverse knowledge of individuals is extremely important to organisations. She further argues that KS is the link between the organisation and the individual. To put it in other words, the stream of knowledge that flows between individuals becomes organisational intellect and directly contributes to the success of the larger group.

A final perspective on the use of the terms KT and KS is highlighted by Sveiby (2007) and reiterated by Paulin and Suneson (2012). It centres on the scholar's basic view of knowledge. Sveiby (2007) puts forward two main views found in the literature. The first group of scholars sees knowledge as an object, separate to its owner(s) (Gupta and Govindarajan, 2000; Szulanski, 1996; Hansen et al 2005). Paulin and Suneson (2012) suggest that this group tends to use the term KT. The second group base their view of knowledge more in line with the sentiments of Polanyi. This group understand knowledge as being embedded in a social context and hence cannot be separated from the individual or the context in which the knowledge is created or learned (Nonaka and Takeuchi, 1995; Davenport and Prusak, 1998). The suggestion is that this group are more inclined to use the term KS.

These definitions are useful in reflecting upon the AR cycles, though they do not necessarily place it within one camp or another. Without a doubt, the social context of learning in an organisation seems to be a key factor in this study, however I hesitate to consider knowledge (and indeed information) in such cut and dried terms. Based on observation of group dynamics, it appears that an individual's sense of their place within a team is complex and constantly subject to change. This sense of place is rooted in the social context of the group and it both affects and is affected by internal and

external factors that influence knowledge transfer. The next section will take a closer look at some of these factors that have been widely debated in the literature.

4.3 What affects knowledge transfer?

As this action research study was intended to create a positive and sustainable change in the way knowledge is shared in the department, it was important to consider barriers to knowledge transfer as well as factors that promote an environment conducive to sharing. I was interested to understand what conditions we needed to create and what we needed to change or avoid. It was also important to determine whether the problems we faced and the issues that arose from our discussions were reflected in the literature.

The experiences of newcomers to Global Team (GT) navigating the norms and practices of the group, sparked an interest in the concept of situated cognition and how it affects the passing on of knowledge. Lave (1993) examines the theory of situated cognition, which argues that knowing and doing are interlinked, and that knowledge is grounded in action which is in turn connected to the specific context of learning – be that social, cultural or physical. Lave suggests a need for closer examination of ongoing social practice as the key to understanding situated learning. The basis for her theory is a study of skilled apprenticeships such as communities of midwives and groups like Alcoholics Anonymous (AA) where people move from being ‘newcomers’ to becoming ‘old-timers’. Learning in this context is much more than just being taught. It comes from being situated within a community and picking up skills which make a person one of the ‘in-crowd’. The social and situational ties suggested here are complex but would explain a lot about passing on knowledge. It also touches on the issue of identifying oneself as part of a group and hence wanting to learn from the group. I would add that identifying oneself as part of a group could also encourage a person to share their knowledge. This is backed by Reagans and McEvily (2003). They found a positive link between the strength of ties and social cohesion within a group, and how easy it was for holders of knowledge to transfer expertise within that group. What Lave’s theory does not adequately address however is the significance of the contributions of ‘newcomers’ to

the team. Do 'old-timers' readily learn from the experiences that new arrivals may bring to the table or is it a one-way learning track?

These scholars underline the previously highlighted notion of the importance of the social context of knowledge sharing. Other key factors that emerged from the AR study will now be examined further. In particular, the questions being considered are: what factors contributed to diminished knowledge sharing as witnessed in GT at the start of the study and what factors promote better knowledge sharing? Based on our discussions and my observations of the team dynamics, some key factors were identified - namely; issues relating to power, organisational culture and leadership. The first two issues are very well portrayed within a conceptual framework proposed by Ipe (2003). Ipe's work is significant because it presents a model of knowledge sharing based on an extensive review and analysis of literature in this field. The framework brings together several contributing factors into distinct categories. An overview of Ipe's work will be given, before narrowing the focus to three of the categories she proposes - namely; motivation to share, opportunities to share and organisational culture. These categories seem to best highlight the issues that were identified in our AR discussions. Various literature relating to these categories will be examined in the light of Ipe's framework.

Ipe's (2003) article aims to create a single comprehensive platform for understanding the factors that affect knowledge transfer in organisations as identified by scholars in various fields relating to organisational practice. Figure 4.2 (shown below) outlines four main factors with associated sub-factors. Three key factors are; the nature of knowledge, motivation to share and opportunities to share. A fourth overarching factor is the culture of the work environment.

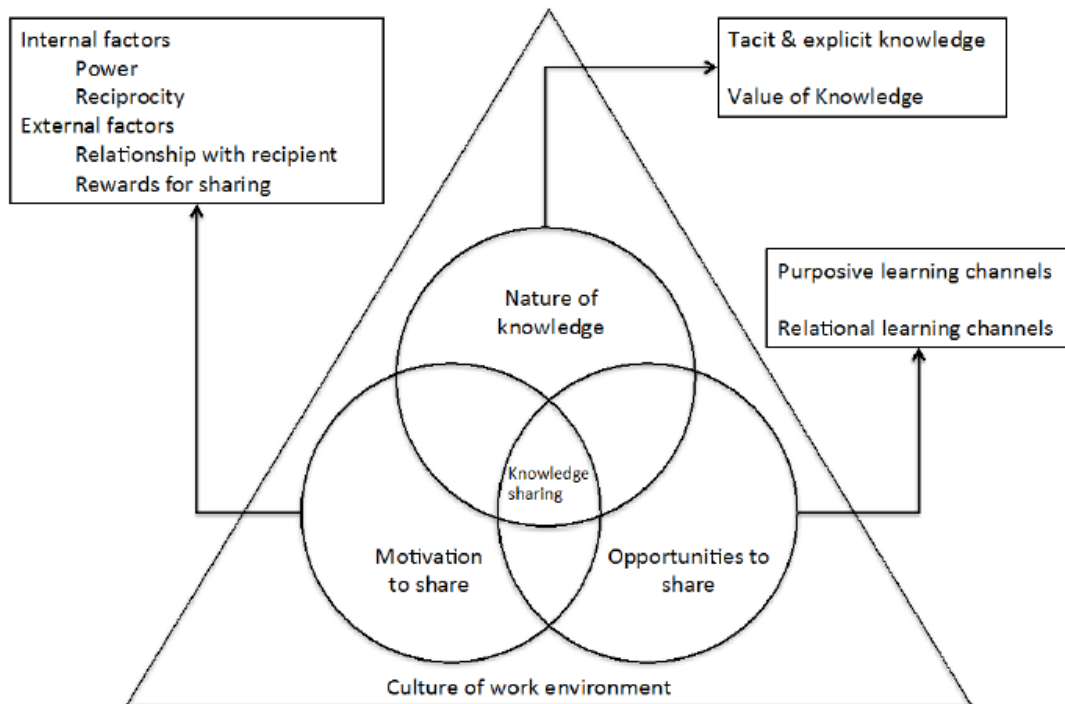


Figure 4.2 – Factors that influence knowledge sharing between individuals in organisations (Ipe, 2003, p.352)

Within these key factors, various smaller factors contribute to the passing of knowledge between individuals. For example, within the context of the nature of knowledge, the tacit and explicit elements of knowledge which have been discussed previously in this chapter, are considered to influence knowledge sharing. The focus of the next three segments of this chapter is to highlight what the literature says about some of the factors noted by Ipe (2003) which became apparent during our AR study. The first of these is power and the related issue of knowledge hoarding.

4.3.1 Motivation to share - Power and Knowledge hoarding

Ipe's (2003) framework suggests power and reciprocity as two internal factors that affect an individual's motivation to share. Of these two, power is the most relevant to our study. In the broadest sense, power can be defined as '*the ability to act or have influence over others*' (www.yourdictionary.com). In the organisational context, power and politics are closely related (Pfeffer, 1992). Pfeffer posits that politics within firms is the exercise of power, with power being a potential force. Similarly, Cloonan et al

(2008) adopt Hardy's (1996) definition of power as '*a force that effects outcomes, while politics is power in action.*' Blackler and McDonald (2000) see power as a medium for and product of collective activity, while Thorelli (1986) adopts the earlier simple definition of the ability to influence the actions or decisions of others but further argues that power is not unilateral. He notes that there is an interdependent relationship between the supposed wielder of power and the person or groups being influenced. Beyond these definitions however, what effect does power have on knowledge sharing according to the literature?

Knowledge is widely recognised as a valuable asset to organisations (Nonaka and Takeuchi, 1995; Gupta and Govindarajan, 2000; Argote and Ingram, 2000; Minbaeva et al, 2003). The concept of knowledge being powerful has implications on a departmental level (Wong et al, 2008) but also has implications at the individual level. Mechanic (1962) raises an interesting point in his examination of the power wielded by lower level employees in organisations. He notes that within firms, people make others dependent on them by controlling access to information and knowledge (among other things). Ipe (2003) argues that individuals, who recognise that having knowledge makes them powerful, are likely to hoard or hold on to what they know.

Husted and Michailova (2002) studied hostile knowledge-sharing behaviour among transmitters of knowledge. One of the reasons they identified for hoarding knowledge was that a person may feel their 'market value' and bargaining power decreases if they share what they know. Knowledge may give them a possible competitive advantage over others, hence they hold on to it. Similarly, Riege (2005) notes that when job security or the need to prove one's worth is an issue – for example in difficult economic times - being knowledgeable makes an individual indispensable. Thus, it would not be in that person's interest to dilute their power by sharing knowledge.

Disterer (2001) supports the view of knowledge being a powerful insurance policy against potential loss of employment. He further notes that by passing on knowledge, the source loses their exclusivity; which is the one thing that makes them unique or gives them influence over others (bearing in mind our earlier simple definition). Du Plessis (2005) argues that an effective knowledge management system focuses on

changing the 'knowledge is power' mentality to a mentality of 'sharing is power.' I would argue that such a change in mentality would require an entire change in the culture of a group to promote an environment where the team's success takes precedence over individual power. Indeed Hackett (2000, cited in Ardichvili, 2008) found culture to be one of the most significant factors in knowledge hoarding behaviour. Gupta (1999) argues that culture change needs to happen from the genesis of an organisation's knowledge management program. He notes that expecting executives to use power to serve others rather than to lord over them requires the '*institutionalisation of unselfishness*' (1999, p.26). This is a lofty concept, however Gupta's (1999) solutions to creating such a culture are not hugely different from other scholars – i.e; encourage dialogue and consider internal and external motivators.

Interestingly, Wang and Noe (2010) agree that being an expert within a team provides not only power but also brings rewards in the form of recognition, bonuses and job security. They however also suggest that for some individuals, power may actually come from sharing knowledge because sharing increases exposure and marks them as an expert on a wider platform. This notion however mainly refers to KS in communities of practice so one could argue that the nature of such communities fosters the desire to be an expert on a wider scale whereas within a small department this is less of an incentive.

Cloonan et al (2008) examined the effects of both trust and power on KS and found mixed results based on the dimension of power being examined. They categorised power into the following dimensions - power of processes, power of meaning, power of the system and power of resources. Their findings were difficult to apply to my organisational situation as they relied narrowly on the specific context of supply chains and the political power play and governance involved in the aerospace industry. A useful learning point from this study however is the negative impact that the power of resources (such as rewards, information, political allegiances, expertise and charisma) can have on the power of meaning (eg; structures, values and language).

A different aspect to power is revealed in the hierarchical nature of some organisations. Connelly et al (2003) note that employees will not share knowledge in groups where

there are perceived power imbalances. This is backed by Husted and Michailova (2003) who note that in organisations where levels of power are clearly demarcated, two types of knowledge hoarding behaviour can arise. On the one hand, subordinates will hide what they know in case it makes their managers feel insecure. On the other hand, managers may hold on to power by keeping knowledge to themselves. From personal experience, this problem of hierarchical power struggles is sometimes related to national and/or working cultures that are more status/age/experience oriented as opposed to being more egalitarian.

A final note on the issue of power comes from Willem and Scarborough (2006) who studied the effect of social capital and politics on knowledge sharing. The authors note that the effect of power and politics on knowledge sharing is often given a negative slant in the literature and while this slant is somewhat warranted, the effects are perhaps more complex than often described. Powerful individuals within groups can have a positive effect on knowledge sharing if they have enough clout to influence the direction a group takes. Political agendas may thus affect the direction of knowledge sharing. Knowledge gives a person power and one could argue that powerful individuals in a team could encourage more collaborative ways of working, especially if they are able to gain influence over newer members. Such individuals can become important agents of change during studies such as ours. This will be considered further in the Chapter 5.

Knowledge hoarding is not always a result of power play in organisations. Husted and Michailova (2003) suggest that other reasons for hoarding include: a reluctance to spend time on KS, fear of failure and fear of knowledge parasites. A reluctance to spend time on KS is understandable. Most employees have very little spare time within the working day to devote to knowledge sharing activities. Our team was made up of 6 people who worked on slightly different schedules to ensure that we always had coverage for our international locations. Majority of the team worked part time and there was only one day in the week when we were all in the office together. Thus, we used our lunch breaks for the dedicated action research discussion sessions and we often took extra time out time during the day for huddles. As time is an expensive commodity in all companies, employees need a good reason to spend their valuable hours on KS.

Fear of failure arises from the fact that contributing what they know opens a person up to scrutiny and potential judgement. Hoarding knowledge prevents others from finding out that one's knowledge is not up to par. A different source of fear – the fear of knowledge parasites – may prevail when an employee has taken time to gain knowledge or create some form of innovation. They may be unwilling to share this knowledge with people who they perceive as benefitting from their hard work while investing less time and effort in knowledge creation/sharing. In their study on how Toyota manages a high-performing KS network, Dyer and Nobeoka (2000) also highlight this last issue of parasites though they refer to them as 'free riders'. They argue that people's desire to share may be affected by the presence of those who happily receive and benefit from knowledge but do not make any contributions.

Hall and Sapsed (2005) create a framework of the propensity to share or hoard knowledge based on results from studies of four project-based organisations and find a link between extrinsic and intrinsic motivation and social or mechanistic influences. They note that their framework may not be a perfect fit for each firm and indeed any analysis of this issue must involve an element of tweaking to suit different scenarios.

This brings me to my general observation about the literature on knowledge sharing. The difficulty with attempting to determine why individuals and groups share or hoard knowledge is that empirical studies invariably focus on specific cases and it is hard to determine how much the idiosyncrasies of each organisation or industry affect the results of the various studies found in the literature. For example, what is the impact of the cultural element of a study conducted in a particular country? How does the type of executives studied (eg consultants versus engineers, salespeople versus supply chain etc) affect results? Does the timing of a study have an impact? During lean economic times where people fear for their jobs, will there be a different response to knowledge sharing than during times of economic boom? Is there a difference between sources of motivation for public, non-profit and private sector workers? Is there too great a focus on managers and mid-level executives? Could the attitude towards sharing perhaps come from a more grassroots level? Most importantly, do researchers start with assumptions about how executives will share knowledge?

Ford (2008) raises an interesting point about the assumptions surrounding knowledge hoarding and sharing. She notes that much of the literature assumes that people sit at various points of a continuum with sharing and hoarding at either extreme. Ford however finds that there is an alternate behaviour where people are simply disengaged and are neither consciously hoarding nor sharing. People may share knowledge completely or hold some elements of knowledge back due to various factors. They may actively withhold (ie; hoard) knowledge but in many cases (70% of those in her study) they are not intentionally avoiding sharing. Instead, they are disengaged from the situation. Ford (2008) outlines the following reasons for disengagement; isolation, being too busy /having time conflicts, lack of energy, recipient disinterest/language/lack of need, work-life strain, viewing sharing as a low priority, lack of opportunity, boredom and personal traits such as shyness or the inability to express oneself. This raises the question of how many other studies may have been skewed by unidentified disengagement - particularly in environments where employees have never been required to reflect on either their level of engagement or KS within their team. More importantly it provides a valuable insight into potential underlying causes of the state of GT outlined at the start of this thesis. The effects of disengagement will be considered further in Chapter 5.

4.3.2 Motivation to share - other factors affecting KS

Various other factors are highlighted in the literature as having an influence on motivation to share. Spender (2003) urges managers to consider the effect of uncertainty and emotion on KS. Working from the premise that various types of knowledge are simply reflections of the different ways in which we perceive the world, he notes that uncertainty makes people emotional and causes them to react emotionally. Managers would need to consider this when trying to understand what helps or hinders employees' reactions to KS.

Pierce et al (2001) raise the interesting perspective of psychological ownership of knowledge in the workplace. They note that people develop feelings of ownership

towards objects, entities, ideas and artistic creations. This could have a positive effect in a situation such as our study where team participation in understanding and solving departmental problems gave them the feeling of efficacy. Pierce et al (2012) describe this as feeling as though they 'have a place' and have a direct causal impact on something for which they have been able to take control. This may explain why Cao et al's (2012) study revealed that team task and job engagement have a significant positive effect on knowledge transfer. Similarly, van den Hooff and de Ridder (2004) suggest that when employees are committed to an organisation, there is a positive influence on donating knowledge.

In Ipe's (2003) framework which was considered earlier, other factors (in addition to power) that were identified as influencing KS included; *reciprocity, rewards for sharing and the relationship between the source and the recipient*. Reciprocity can have a positive effect in cases where team members believe that they will learn as much from others as others will learn from them; causing them to be more inclined to participate in a sharing culture. As far as rewards are concerned, the literature yields mixed results as to the effects on knowledge sharing. Writers like Gupta and Govindarajan (2000) see a positive link between rewards and incentives and knowledge sharing; yet others disagree and there is no clear consensus on the issue of rewards and incentives. In a field survey of 154 managers from 27 Korean organisations, Bock et al (2005) found that rewards have a negative effect on individual knowledge sharing attitudes. It would be interesting to replicate this study in a different cultural environment to determine whether national culture had any influence on this result. Lin's (2007) study of 50 Taiwanese organisations found that factors such as self-efficacy, the joy of helping others and reciprocal benefits significantly affected attitudes to KS but organisational rewards had little effect. Tissen et al (1998, cited in Ipe 2003), suggest that if knowledge sharing sits well within the culture of an organisation, then people would gain intrinsic rewards from sharing and would be less influenced by monetary rewards. Wolfe and Loraas (2008) argue that the monetary or non-monetary nature of an incentive is not the determinant of how effective it is. Instead what matters is whether the individual considers the incentive to be sufficient. In their study, non-monetary incentives were not considered to be effective by the group surveyed. The group was also less inclined to share knowledge when the peer environment encouraged knowledge hoarding. It is

however unclear how much the composition of the group affects this result. In this case, the group was made up of MBA students.

The relationship between the source and the recipient is recognised in the literature as having significant influence on knowledge sharing. Two key elements highlighted within this relationship are *trust* and the *power and status* of the recipient. Foos et al (2006), found that trust was critical to the perceived success of the transfer of tacit knowledge. Becerra et al (2008), argue that the perceived trustworthiness of a person affects *tacit* knowledge transfer while people are more likely to take risks with *explicit* knowledge transfer. Holste and Fields (2010) present a different angle by focusing on two distinct forms of trust; affect-based trust and cognition-based trust. Affect-based trust is rooted in a mutual connection between workers while cognition-based trust is based on a co-worker's reliability and competence. Their study shows that both types of trust are positively related to people's desire to share and use tacit knowledge. Affect-based trust however is more likely to affect the desire to *share* tacit knowledge while cognition-based trust has a greater influence on the desire to *use* tacit knowledge. This makes sense, as employees would only need to feel an affiliation towards someone to share what they know but would need to have respect for (and belief in) the knowledge generated by the other person to feel comfortable using it.

Szulanski (1996; 2000) identifies the relationship between the source and the recipient as one of the key factors affecting KS. Szulanski (1996) builds on von Hippel's (1994) definition of 'stickiness' to examine knowledge-related factors affecting KT. Von Hippel's definition of stickiness is as follows:

'We define the stickiness of a given unit of information in a given instance as the incremental expenditure required to transfer that unit of information to a specified locus in a form usable by a given information seeker. When this cost is low, information stickiness is low; when it is high, stickiness is high. Note that in our definition, information stickiness involves not only attributes of the information itself, but attributes of and choices made by information seekers and information providers.'

In short, stickiness describes the difficulty of transferring knowledge within an organisation. Szulanski (1996) identifies four stages of intrafirm transfer of best practices – initiation, implementation, ramp-up and integration. He notes that at each stage, different kinds of problems will arise. For example, during the implementation stage, a source of stickiness could be gaps in communication between the source and the recipient or the need to adjust the knowledge to suit the recipient's needs or understanding. Szulanski argues that much of the focus on KT has been on motivational factors, however the real barriers to KT are factors centred around knowledge - such as the recipient's lack of absorptive capacity, casual ambiguity and a difficult relationship between the recipient and the source. He further argues (2000) that organizational context can affect the 'eventfulness' of the transfer. A fertile context is one where the genesis and progression of transfers is promoted, while in a barren context, transfer is hindered at different stages.

As will be seen in the next chapter, stickiness may not necessarily arise from the areas that Szulanski suggests, however two points raised by Szulanski (1996; 2000) that are confirmed in much of the literature are the importance of organisational context and the fact that once knowledge is successfully transferred, it is integrated into the team's collective knowing in such a way as to become the 'objective, taken-for granted reality.' Elwyn et al (2007) point out something that both Szulanski and Carlile (2002) successfully convey. It is the simple message that *knowledge transfer is normally sticky*. To expect otherwise is almost to sabotage one's change efforts because it is unrealistic to consider introducing a better form of sharing knowledge within an organisation without being prepared for some speed bumps along the way.

4.3.3 Organisational culture and opportunities to share

The organisational context in which KS/KT takes place has an impact on how successful it is (Szulanski, 1996; 2000; Gagne, 2009; Chatterjee, 2014, Roberts, 2000). Joia and Lemos (2010) found that factors that affect knowledge transfer are often specific to each organisation however, the organisation's structure and the strategy adopted for knowledge management have an impact on the successful transfer of tacit knowledge.

Ipe (2003) notes that the organisational environment influences all the aforementioned factors. Culture plays an important role in the way employees operate in the workplace, therefore, no matter what measures are put in place to manage knowledge, the overarching culture will determine the outcome. De Long and Fahey (2000) see culture as the manifestation of the values and norms of an organisation. They note that the prevailing culture will determine whether people would be interested in sharing knowledge at all. Indeed Nonaka and Takeuchi (1995) suggest that organisational culture determines people's mindset and actions. An organisation (in our case, a subsection of an organisation) will need to place collective value on knowledge sharing and actively promote the conditions and behaviors that enable sharing. Chatterjee (2014) finds that bureaucratic and hierarchical organisations face great obstacles to successful knowledge management. He notes that removing these obstacles is necessary for the free flow of knowledge distribution. Similarly, Tsai's (2002) study found that a formal hierarchical structure, in the form of centralization, has a significant negative effect on knowledge sharing.

Ipe (2003) highlights the need to create opportunities to share knowledge in her model for optimal KS and Desouza (2003) holds a similar view. He argues that rather than focusing on IT systems as the solution to knowledge issues, organisations need to encourage people to talk to each other and share their 'know-how'. Indeed, where the question of motivation is concerned, Osterloh and Frey (2000) highlight the need for organisational forms that emphasize participation and personal relationships.

Joia and Lemos (2010) suggest that the more flexible an organisational structure is, the greater the tendency for employees to want to share tacit knowledge. This is understandable as knowledge sharing is an interactive process and removing certain constraints could encourage greater participation. Lucas and Ogilvie (2006) found that when workers are actively involved in decision-making, knowledge transfer is more successful. Ardichvili (2008) suggests that an environment where people trust each other and have faith in the integrity of the group is an important factor in enabling KS. Ardichvili's study focuses mainly on Virtual Communities of Practice and hence it is unsurprising that trust is a concern for people who may never have met each other in

person however trust is also likely to play an important role in other groups, as noted by Adler (2001) who sees trust as the '*key coordinating mechanism in the community form*' (2001, p.21). There is a general theme within the literature of the need for organisations to create an organic, knowledge sharing culture rather than attempting to force participation (Argote et al, 2003; Cheng et al 2009). A final note from Hendriks (1999) is that KS within a group is maximised if individual ambition matches the group ambition.

4.3.4 The role of leadership

A final area of interest from the AR study is the role of leadership. While there was some reference to this in the group discussions and in ad hoc meetings, the significance of leadership in driving change in GT comes primarily from my observations of the nature of the team before, during and after the study. Creating an environment that enables knowledge sharing became possible due to a leadership decision to involve the team in joint decision-making about departmental activities. The following section considers what scholars in this field believe managers need to do to create such an enabling environment.

Garvin (1993) identified some practical steps managers should be taking beyond the theoretical notion of creating a learning organisation. Among these steps is actively fostering an environment where people can learn and share. This involves allowing specific time and space for discussion, reflection and analysis and ensuring that employees are not penalised for taking time out for sharing. Another important step suggested by Garvin echoes Joia and Lemos' (2010) and Chatterjee's (2014) comments about the need for flatter and more flexible organisational structures. Garvin encourages an opening of boundaries so that people can share across disciplines, rankings and departments. Grant and Grant (2008) call for leaders to step away from their reliance on single solutions like IT repositories and instead adopt a more holistic (Next Generation) approach to knowledge management. Sveiby (2007) raises an important point. He states that inaction on the part of managers creates barriers to learning. In his words; '*an apathetic manager who does not actively encourage*

knowledge sharing is unwittingly creating obstacles to share and is gradually disabling the context for creating, sharing and applying knowledge. The silo walls in organisations are built of apathy' (2007, p.1651).;

Lucas and Ogilvie (2006) underline the social context of knowledge transfer. This is a recurring theme in the literature and speaks to the fact that a people-centred approach to solving knowledge sharing problems is most likely to yield the best outcome for organisations. Goh (2002) notes that KT will best thrive in organisations where individuals and groups demonstrate a high level of co-operative behaviours. Managers would need to foster such behaviours. Indeed, Bock et al (2005) stress the need for management to commit to knowledge management initiatives and to promote a climate of fairness, innovativeness and affiliation. Lin (2007) brings a different perspective to the discussion. In addition to the expected recommendations of better communication and addressing employees' lack of cooperation and trust, the author also argues that a perceived absence of organisational justice can affect knowledge transfer. Thus, managers would need to ensure that ethical policies are in place to ensure distributive justice and procedural justice within the organisation.

From their review of literature and their own findings, Wang and Noe's (2010) make two significant points about the role of leaders. Firstly, the nature of leadership determines the knowledge sharing norms of a group and secondly, employees need to have faith in their managers to feel certain that sharing knowledge will not result in a loss of value (ie; a loss of expertise). This second point is an area that has not been deeply examined in the literature. There is a need for more practical suggestions on how leaders can encourage their teams to see that sharing does not necessarily result in a loss of power or value within a team. Disterer (2001) briefly addresses this by suggesting that managers 'walk-the-talk' by avoiding knowledge hoarding behaviour themselves and effectively leading by example.

Whatever else managers do to promote knowledge sharing in their organisation, it is important that they have an actual plan of action (Hansen et al, 1999). Bryant (2003) looks at the link between leadership and knowledge sharing from the perspective of

types of leadership. He argues that transformational leaders have the advantage when promoting knowledge sharing at the individual and group level however they may be less successful at setting up wider structures and systems for knowledge management. Transactional leaders on the other hand may be more effective at putting such structures in place and hence this leadership style is useful on an organisational level. Another study that examines types of leadership and resulting effects is Yang's (2007) extensive examination of the hotel industry in Taiwan. Yang looks at leadership characteristics that display the following roles; facilitator, mentor, innovator and monitor. The study found a positive link between knowledge sharing effectiveness and facilitator, mentor and innovator roles but a negative relationship between the monitor role and knowledge sharing. Like many other studies, the need for leaders to establish a collaborative organisational culture was highlighted. Similarly, Srivastava et al (2006) found a positive relationship between empowering leadership, knowledge sharing and team efficacy. This in turn positively affected overall performance. This echoes Lucas and Ogilvie's (2006) assertion that KS is more successful when teams are involved in decision-making. It is therefore important at group level for leaders to create an environment where employees feel empowered to contribute and to use their knowledge for the good of the team.

4.4 Power in the organisational context

Earlier sections in this chapter examined power and its relation to knowledge sharing because power was identified as a key component in our problem. What we did not consider in our discussions however, was a broader look at power and how it affects the actors in an organisational setting. The culture of behaviours in GT did not occur in a vacuum. GT is not only part of a network, but also plays a specific role within the wider organisation. What we did not discuss was how the power dynamics in Interco's organisational structure could have influenced the behaviours in GT. According to the literature, traditional interpretations of power describe one party having some form of influence over another. Various scholars suggest that within the context of an organisation, this influence can be used for political gain because the party with power has the knowledge, the voice or simply the drive to be in charge. Those who lack influence end up at a disadvantage. (Buchanan and Badham, 2008; Gaventa and

Cornwall, 2008; Lukes, 2006). These writers argue that the dynamics of power within organisational structures is not as simple or as straightforward as the traditional view outlines. For example, Gaventa and Cornwall (2008) highlight the work of Bachrach and Baratz (1970 cited in Gaventa & Cornwall, 2008) who note that the wielder of power is not only the winner in a situation. The holder of power often has the influence to prevent other parties from joining in at all. The disadvantaged party never actually had a credible chance of winning. When this latent power is used in a political or organisational context, it is manifested in the form of structures created by the influencer that robs the influenced party of having a voice. Indeed, they may not be aware that having a voice was an option (Lukes, 2006). Buchanan and Badham (2008) note that the traditional definition of power is direct and visible while the other, more subtle, concept of power is pervasive. The powerful party makes others think in a way that suits their purposes. In an organisation, employees believe that things happen in a certain way because that is simply the way things should be. They accept this because it falls in line with the political structures that they have been led to believe is the norm. One of the reasons why GT and the network maintained their unique position within the company was that there were policy structures in place in the international and local HR functions that always kept the Satellite offices at arm's length from the organisation. Some Satellite staff faced a constant uphill battle of proving their credibility to the local HR teams who saw them as less important than 'real' HR staff. Indeed, even though GT is a legitimate department incorporated into the expat policy team, GT has continually fought (and lost) the battle to gain access to some HR information that would make a major difference to the team's ability to offer a good service. The policy of withholding this information keeps GT and the network in a no man's land situation of being part of the company – but not quite. Perhaps it is not surprising that a department would retain unhelpful behaviours when the organisational structures in place enable that situation. This concept will be considered further in Chapter 7 in relation to how the effects of this insider action research study on GT's place within the organisation.

4.5 Summary

The purpose of this literature review was to examine key themes that arose from the AR study and that may have contributed to the diminished knowledge-sharing

environment in GT. It was also a means of identifying whether the solutions we adopted as part of the study made sense within the context of existing literature. Key concepts identified in the literature focus on people-centred factors that affect knowledge sharing. Having identified from writers such as Nonaka and Takeuchi (1995) the significance of the tacit and explicit elements of knowledge in the process of transfer, the various factors that aide or hinder the process are examined using Ipe's (2003) amalgamating framework as a starting point. Key factors considered have included power dynamics, knowledge hoarding and disengagement. The intricacies of the relationship between the source and the recipient raises issues relating to trust, reciprocity and once again power and position within the team. In addition, incentives for sharing and the overall culture of an organisation, as well as the role of leadership play a part in transferring knowledge according to the literature and this reflects GT before, during and after the AR study. The organisational power structures that may have contributed to the problems in GT were also considered. The extent to which these factors influenced the state of affairs in GT varies considerably. These influences and variations will be discussed further in the next chapter where the effects of each factor will be considered at length.

Chapter 5 Analysis and discussion

5.1 Introduction

At the beginning of this study, I described a problem relating to knowledge transfer in my department and how it affected my team. The second chapter outlined the choice of Action Research as a means of finding a solution to this problem. Chapter 3 provided a description of the process of the Action Research study; highlighting key themes that emerged from our group discussions. After the Action Research cycles were completed, I took some time to examine the various comments made during our discussions and to consider common threads that arose from the discussions and resulting actions and reflections. The analytical process of identifying these threads using data from transcripts of the taped discussions was outlined in the Methodology Chapter (Chapter 2). The review of literature in Chapter 4 examined how these key themes aligned with extant knowledge on knowledge transfer. In this chapter, I would like to bring all these elements (action, reflections, thematic analysis and literature) together to evaluate the themes and events in my department in relation to the findings from the literature. Firstly, I will take a step back to highlight the themes that I identified from our discussions, then I will consider each of these prominent themes as well as other themes that were highlighted in the literature and reflect on what this means for our study.

5.2 Themes arising from the AR cycles

Looking back on my perspective at the beginning of the action research cycles, I realise that as a scholar practitioner, I was unconsciously looking for themes that would fit neatly into recognised paradigms within the literature on knowledge sharing. Perhaps this was because I was keen for the study to have academic relevance. A few days before our initial discussion session, I skimmed through some literature on knowledge management as preparation for understanding what could be contributing to the

'stickiness' (Szulanski, 1996; 2000) of knowledge in GT. Much of the literature focused on the IT aspects of knowledge management but there was also a broad spectrum of people-focused concepts. It would have been ideal if one theme emerged from our inquiry that could adequately explain our situation. In reality, the workings of an organisation do not necessarily fall comfortably into well-defined boxes. Thus, I had to examine my assumptions about my expectations of what the emergent themes would be.

On reflection, I had some preconceived ideas about the root causes of our problem. I believed that the nature of our unique network influenced the way team members work and affects attitudes to knowledge sharing. Lundy and Cowling (1996) consider organisational culture to be '*the way we do things round here.*' This definition aptly describes the situation in GT the Satellite offices. Things had been done in a certain way for years. This, coupled with the issue of high turnovers, contributed not only to diminished knowledge sharing, but also to the acceptance of it. In my view, the fact that past team members remained integral sources of knowledge was simply a result of the accepted norms and practices of the department. Martins and Terblanche (2003) define organisational culture as '*the deeply seated (often subconscious) values and beliefs shared by personnel in an organisation.*' They further note that this culture includes a set of basic assumptions that have worked well over time and hence are accepted as *valid* assumptions. This aptly describes the network's approach to knowledge sharing. I was therefore expecting that organisational culture would surface as a theme in our discussions, but I was unclear as to what aspects of culture were significant or indeed what other factors would be uncovered.

I also perhaps placed too great an emphasis on the department's systems as opposed to the people within it and how their sense of place within the organisation affected the way they work. As will be seen in this chapter, our work environment was indeed central to the problems we faced in GT, but not in the ways I had expected. Our discussions revealed some people-centred factors which thrived within the context of our way of doing things. Key among these were the issue of knowledge hoarding and the power that individuals gained from being the recognised holders of knowledge. Primarily, this perceived power was enabled by the culture of the team. Various factors

such as trust and disengagement were also highlighted as influencing knowledge hoarding. Once change initiatives were in place in our department, there were additional factors that affected the speed of change. These included technical difficulties with the Sharepoint application and individual approaches to putting change ideas into practice. Lastly the role of leadership was also revealed as being significant. These factors will be now be examined in light of the literature.

5.3 Prominent themes

In Chapter 4, I used a conceptual framework created by Ipe (2003) as a foundation for examining key factors that affect knowledge transfer. I chose Ipe’s model because it is a collation of results from a broad range of literature in this field. The framework (reshown below as Figure 5.1) highlights key factors affecting knowledge sharing and further highlights sub-factors within each category that have an impact on the way individuals share knowledge.

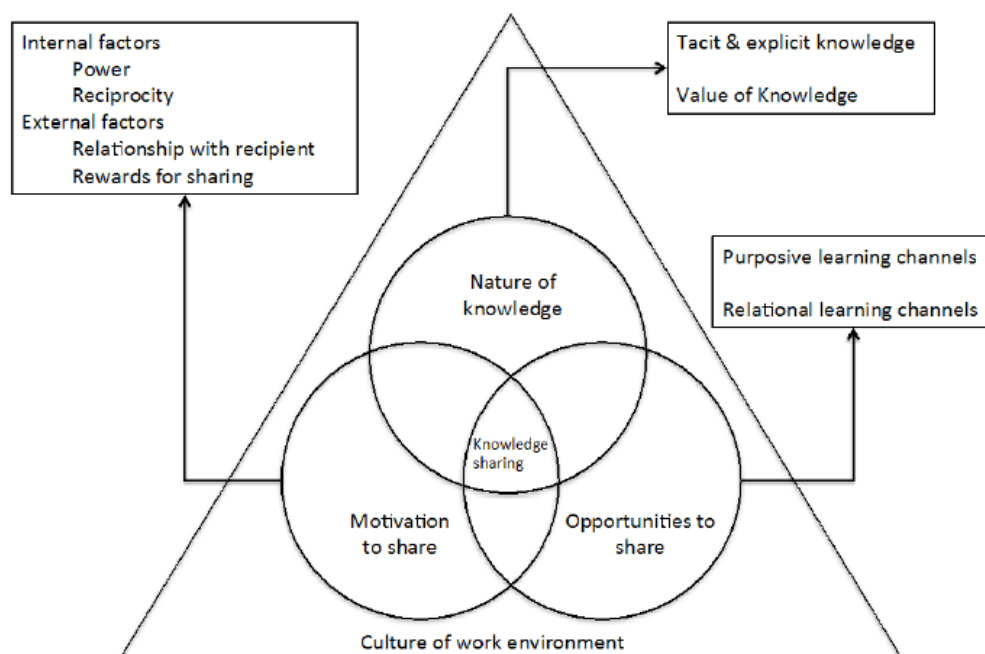


Figure 5.1 – Factors that influence knowledge sharing between individuals in organisations (Ipe, 2003, p.352)

Ipe's framework brings together several significant factors derived from numerous studies in different contexts. During the cycles, the team discussed some of the areas that we believed had been uncovered by our discussions. After the fifth cycle, I then used a manual coding system to identify which of these areas were recurrent in the context of our department. The three factors from Ipe's framework that align most with the themes that arose from our AR cycles were the Culture of the Work Environment, Motivation to Share and Opportunities to Share.

5.3.1 Culture of the work environment

Writers such as Nonaka and Takeuchi (1995), De Long and Fahey (2000) and Ipe (2003), suggest that the environment in which workers operate is a key influencing factor in the success or failure of knowledge sharing. According to these scholars, organisational culture determines how people think and act; and it also serves as the ingredient that either enables or hinders all other factors. During our discussions, the way we worked as a department came under scrutiny. While other factors were significant, the way in which we worked and the accepted assumptions about our working environment (Martins and Terblanche, 2003) provided fertile ground for people to operate without an efficient knowledge sharing system. For example, not long after I took over as manager of GT, I was presented with an overdue bill from a third-party contractor that serviced our website. On investigation, I found that the bill was overdue because information about payment procedures for this contractor was held by a former employee. The fact that this individual was the only person in the team who understood this procedure had simply been accepted by the team because at one point in time, she was the only team member who was a local and could therefore discuss issues with the contractor in the local language. De Long and Fahey (2000) consider culture to be the manifestation of the values and norms of an organisation. In GT and the wider network, situations such as the one concerning the bill payment were the norm because current and past employees considered themselves to be lifelong members of the GT 'family.' Remaining an 'expert' kept a person linked to the network and the culture of the department nurtured such practices. During our discussions, two team members who had been linked to the network for many years (Mabel and Sally),

raised the issue of the importance of history and context in understanding the way the department worked. People's actions within GT and the wider network were often based on historical events that determined their assumptions. An interesting point was made during our final discussion. It was noted that most people who had previously worked within the network, took pride in recounting tales of their personal contributions to the department rather than considering the successes (and effectiveness) of the network as a whole. In their minds, the success of the network was a by-product of their actions. This brings to mind De Long and Fahey's (2000) notion of values and norms and Nonaka and Takeuchi's (1995) suggestion that organisational culture determines people's mindsets. The history and context of the network play an important role in the culture of the organisation.

A further observation about the culture of our environment relates to the ability to change what is considered to be accepted norms and practices. In particular, the relation between creating a new culture and improving knowledge sharing within our team became apparent during our study. We found that the open nature of discussions and the ability to deliberate and speak freely, opened people's minds and encouraged them to contribute and learn. Although the team did not always enjoy the new practice of codifying tacit knowledge by putting information in Sharepoint, this quote from Desouza's study of a Chicago software firm perfectly sums up our experience:

"By making knowledge sharing a pleasurable experience, employees were more inclined to take special efforts coding tacit knowledge into an electronically transmissible format"
(Desouza, 2003, p.87).

Similarly, Lucas and Ogilvie (2006) found that when workers are actively involved in decision-making, knowledge transfer is more successful. I would add that based on the changes I observed in our department, there is another element that can be added to this. Giving people the opportunity to create a new culture where a conducive one is lacking; is a potentially powerful approach. In other words, the empowerment to create knowledge and determine how it is shared, can positively affect the transfer of knowledge. We witnessed a change in team behaviours within a relatively short period of time. While my team would not have actively referred to this as changing

departmental culture, they did see it as changing the way we do things. If culture is indeed '*the way we do things round here*' (Lundy and Cowling, 1996), then changing our procedures created a culture that encouraged knowledge transfer.

In the previous chapter, it was noted that organisational context influences knowledge sharing (Szulanski, 1996; 2000; Gagne, 2009; Chatterjee, 2014, Roberts, 2000; Joia and Lemos, 2010). Ipe (2003) further argues that organisational culture is so significant that the outcome of measures to improve knowledge sharing is heavily dependent on the overarching culture. This was highlighted during our discussions, when a question was posed about the sustainability of our changes. The general consensus was that having created a different way of doing things, this new way had become 'a new normal' for us and thus future incumbents of our roles would know no other way of behaving. In short, the creation (and maintenance) of a new culture was indeed important to the success of our change initiative.

5.3.2 Motivation to share

During our discussions, a topic that frequently came up in different forms was the question of why people held on to knowledge in GT. Culture – ie; having always done things that way - was obviously a factor, however I wondered if there was some unconscious benefit to the individual of holding on to knowledge. Riege (2005), highlights one obvious benefit. The writer suggests that job security can be a catalyst for knowledge hoarding. Making oneself indispensable is understandable during lean economic times because having knowledge gives one an element of power. Indeed, as noted in previous chapters, GT was affected by the downturn in the oil and gas industry. In addition, historical conflicts with some key stakeholders existed due to the unusual nature of the team's role within the wider organisation. This meant that there was an unspoken threat over the existence of the team, resulting in them feeling as though they constantly needed to prove their value to the company. This may have influenced some individuals' attitude to knowledge sharing.

Early on in our discussions, Sally pinpointed the benefit of being a GT 'expert'. This allowed individuals to create what she referred to as 'little kingdoms.' This was indeed an astute description of the way GT had previously been run. Husted and Michailova (2002) note that people hold on to knowledge because it might increase their value within a team. Being an expert would give them an advantage over others. In the context of the literature studied in Chapter 4, this would give a person an element of power within the team. Indeed, in GT and the network, being the incumbent 'guru' of a particular topic guaranteed that current team members were highly regarded fountains of knowledge. Similarly, holding on to knowledge ensured that former members of staff remained relevant, even though they no longer worked in the department. Various members of the team commented on the 'little kingdoms' concept at different points in our discussions. New recruits to GT would initially stand in awe of the knowledge of longer-serving team members. Bryan and I were both impressed by certain individuals' ability to reel off information memorised in their heads. Katherine commented on being daunted by this initially. We all however quickly moved from being in awe, to being frustrated at not being able to access information when the experts were away. Thorelli (1986) argues that power is not unilateral. The author suggests that there is an interdependent relationship between the supposed wielder of power and the person or groups being influenced. In other words, there is no power without a person to influence and the system in GT thrived on newcomers looking up to those who were more knowledgeable. This became most apparent during the period when the team was short staffed. Individuals who were away for various personal reasons wielded an uncomfortable power over the team because they were indispensable – and knew it. In their absence, those of us holding the fort, felt obliged to seek information from past team members. These forages for information would often come with unsolicited advice on how things could or should be done. We unconsciously enabled the expert culture by being reliant on the gurus even though we acknowledged that this was not an ideal way to run a department.

Willem and Scarborough (2006) highlight two interesting aspects of power that relate to GT's context. The writers suggest that the wrong know-how can be passed on when knowledge lies in the wrong hands. One of the challenges we faced within the department and indeed in the wider network, was overcoming bad practices that had

become the norm simply because the expert of the day did things in that way. This was a significant problem that underlined the lack of coherently documented procedures and the absence of a decent knowledge repository. With newcomers looking up to incumbents for knowledge, the wrong information was often passed on. This meant that stakeholders were frequently given conflicting information depending on who they spoke to. Willem and Scarborough (2006) however also note that power can have a positive effect. Our AR study confirmed that powerful influencers can wield a positive effect within a group. In GT, Mabel was a perfect example of this. Her acceptance of the need for change and willingness to take the lead; both in terms of technology and mental preparedness, was a significant driver of change in the team. In order to change the way we behaved in GT, there needed to be a mental shift as well as a change in our daily procedures. As team leader, my influence was important, however the existence of a powerful change agent within the team – particularly one whose ‘expert’ status was confirmed, was in my opinion a major factor in the positive outcome of the AR project.

As noted in Chapter 3, Mabel was instrumental in creating the Sharepoint platform that became our knowledge repository. She was also instrumental in training the team and fine-tuning the application based on our feedback and the learnings that came from our cycles of action and observation. From my perspective, the most interesting thing about Mabel’s influence was that she had enough experience within the network to benefit greatly from the ‘little kingdom’ syndrome. Indeed, the power she wielded meant she was invaluable to the team. Yet, Mabel had a deep understanding of the need for change. She recognised that the status quo was not sustainable if the department was to survive in the long term. Her vision for the future of the department meant that she was determined to create a technological solution to our knowledge sharing problem. Willem and Scarborough’s (2006) concept of the positive effects of power – as demonstrated by Mabel – brings to mind the intentions behind the actions of those who either choose to share or hoard knowledge. Previously cited texts have highlighted the possibility of an employee holding on to information for their personal benefit within the company (Mechanic, 1962; Ipe, 2003; Husted and Michailova, 2003; Riege, 2005). These authors suggest there are many reasons for this; including issues relating to trust, job security and the power that comes from holding on to knowledge. Mabel held a unique position of power as an expert in GT. The fact that she was motivated to share

her knowledge – and indeed to encourage others to do so - could suggest that a set of positive factors were in places.

Ford (2008) offers a different explanation for the motivation behind knowledge hoarding. The writer argues that disengagement could be the underlying reason why people hold on to knowledge. Employees may not be actively using knowledge as a form of power play, instead, they may simply be disengaged. In GT, one reason could have been a simple lack of personal drive. Past team members openly acknowledged that though the department was always pressed for time because the team generally worked on a part-time basis, their actual roles were not particularly taxing and they were comfortable with this arrangement. They felt no need to change the status quo. Indeed, even current team members like Brian and myself, though actively immersed in the change process, were slow to change our ways of working, simply because we had become used to the way things were. Brian summed this up during one of our discussions with the following comment:

'We've created SharePoint, we've sort of dealt it out a little bit and played with it and seen how it fits into our current practices. I'm not doing it. I cannot speak for other people, I'm not doing it the way that it could be to its potential but, it's still clear to me that it's the way forward. I just haven't adapted my work practices to it yet.'

This makes sense in the light of Ford's (2008) argument outlined in Chapter 4. The author suggests that people who are disengaged are not consciously choosing to share or hoard knowledge. They are detached from the situation for various reasons. One of the reasons suggested is being too busy or having time conflicts. This was a persistent factor in GT. With people working on a part-time basis, individuals had to determine what they considered to be a priority. Indeed, other reasons put forward by Ford include; viewing sharing as a low priority, lack of energy and personal traits among other things. Thus, while the power dynamics of GT have historically been a definite factor in the sharing or hoarding of knowledge, there may have been a potential element of disengagement contributing to this problem.

5.3.3 Opportunities to share

In earlier chapters, I described the absence of knowledge-sharing habits within GT that led to this study. As seen in the extant literature, a lack of opportunities to share knowledge is just as important as the individual's motivation to share (Ipe, 2003; Chaterjee, 2014; Sesouza, 2003; Osterloh and Frey, 2000). According to these writers, organisations not only need to have the correct systems in place, but also need to foster an environment where people can share easily and feel comfortable doing so. Ipe (2003) outlines formal and informal opportunities to share knowledge. Formal channels tend to be explicit in nature and include knowledge repositories, organised work groups and training sessions. Informal channels include social networking and one-to-one relationships where tacit knowledge is more easily transferred. Before our AR study, there was no active barrier to sharing knowledge in GT. No one was discouraged from passing on information. However; with regards to formal sharing channels, there was no user-friendly knowledge repository. The 'black hole' was our best offering. The chaotic nature of the black hole system meant that even when a person actively tried to seek knowledge, the opportunity would often be lost, because they simply could not find the information they needed. Structured virtual training sessions where knowledge flowed from GT to the Satellites did exist; and listening in to these sessions was sometimes a means by which new GT team members found out about network procedures. These sessions were useful but arbitrary and did not always include the required knowledge about providing support to the network. Most importantly, sharing tacit knowledge was not a priority. The expert/guru culture was accepted as the norm. Thus, even during handovers to new team members, an expert's name would simply be mentioned as the one to go to when information was required. From the perspective of the expert, opportunities to pass on knowledge arose whenever a newcomer was referred to them but these interactions often took the form of sending an expert an email whenever there was a question or in some cases asking the expert to deal with whatever the situation was on your behalf. Belkahla and Triki (2011) note that tacit knowledge is shared most effectively in informal settings because of the relationships built between the holders and receivers of knowledge. What was missing from the guru-reliance system was the opportunity to build the kind of relationships that thrive on

trust, respect and friendship and hence foster a positive knowledge-sharing environment.

The introduction of the SharePoint platform went a long way towards improving the formal transfer of knowledge. A key aspect of this was creating well-ordered metadata that made finding information easy. Mabel set a standard for naming folders and classifying information which ensured that we did not repeat the black hole problem of folders being given names by individuals, which meant nothing to other team members. A simple example of this was the network's annual report. Every year the team member in charge of communications compiled a report based on data sent to the Advisers from the various Satellite offices. Katherine was the communications lead during the period of the study. Previously, each Adviser stored this data either on their own desktops or in the black hole in arbitrarily-named folders. Thus, when Katherine tried to collate this information, she faced a major hurdle just trying to access the data. As part of our switch to SharePoint, Katherine and Mable set a uniform standard of data needed, and created a structure of how and where this information should be stored. This not only simplified Katherine's working processes, it also meant that anyone could gain a quick overview of information about a Satellite office from SharePoint. This system was applied to many other aspects of our work with the network and it helped to reduce the liability of staff absences and to make handovers much easier.

As noted previously, the opportunity to share consists of both offering the right systems and creating the right environment. Weekly team meetings and one-on-one sessions between the manager and team members had always been the norm in GT. These sessions usually focused on solving immediate problems and giving general updates on each territory. A new behaviour that evolved in our team alongside the AR discussions was regular group huddles where we shared ideas and helped each other overcome problems. We also introduced virtual discussion sessions with Focal Points of the Satellite offices which we called Mentoring Circles. This was as useful a knowledge sharing community for us as it was for the Focal Points because many of them fell into the category of being the experts who had worked within the network for many years. It is worth noting that these changes did not happen overnight. It took a while to get everyone to change their ways of operating. Despite SharePoint being a much more

user-friendly repository than the black hole, some of us still clung to the old ways and had to be coaxed towards new practices. A change of mindset was needed to fully embrace our new office rules. According to Nonaka and Takeuchi (1995), the mindset and actions of employees are influenced by organisational practices. Thus, the opportunity to share may be introduced as a new initiative, but if this does not fall in line with the thinking of employees – based on the existing culture, - a total change of behaviour may be required in order to create a mindset that allows employees to take advantage of that opportunity.

5.4 The interplay between culture, power and knowledge-sharing in GT

Traditional thinking surrounding the role of culture in organisations has centred on the concept of culture as an underlying way of behaving that influences people's actions. An alternative view considers situations where people draw on culture as a flexible toolkit of "cultural resources" such as symbols and narratives pertaining to the organisation. Actors in organisations use these resources to fit given scenarios and achieve certain goals (Rindova, Dalpiaz and Ravasi, 2001). Swidler (1986; 2001) considers cultural resources to be a toolkit made up of customs, abilities and designs that are the embodiment of a given culture. In the organisational context, the elements of this toolkit can be fashioned to further people's agendas. For example, during my tenure as manager, the network celebrated twenty years of being in existence. The story of the creation of the first Satellite offices and the eventual incorporation of GT into HR, had always held an almost sacred place in the minds of past and present team members. It was used as a reason for explaining why we were unique and why in some ways we seemed exempt from following certain protocols and standards that were set by the wider organisation. It was the foundation for the way things were done in GT. There was an ongoing 'battle' between those linked to the network who romanticised the story and saw it as a reason why GT should proudly stay true to its roots and those who believed it was time for the story to evolve if the network was to overcome some of its shortcomings. As the manager charged with putting together a twentieth anniversary celebration while also attempting to create more efficient knowledge sharing practices, I was acutely aware of the network's narrative and the way it was used to further the

cause of each side. Weber and Dacin (2011) see traditions as '*strategic resources or raw material for the creation and maintenance of culture*' (Weber and Dacin, 2011, p.294). This understanding of culture as a flexible resource which actors employ to influence organisational behaviour, is a notion that fits with the behaviour of influencers in the world of GT and the wider network. Weber and Dacin (2011) highlight the significance of tradition and heritage in organisational contexts. The behaviours in GT that created a knowledge-sharing problem, were rooted in an adherence to traditions that were not always helpful but which maintained a status quo. Experts in the GT world used stories and experiences of managing expatriation to weave a fabric of traditions that promoted their influence. One such tradition was the use of a special web hosting company for the network's website. There was a belief that only certain individuals could liaise with this company, due to their fluency with the local language. It was also assumed that this company was the best choice for the service we needed. It quickly became apparent to me that the web hosting company were very capable of handling our business in English. It was also clear - after an IT security threat - that our website should (and could) have been incorporated into the wider company's site. Yet, past members of GT insisted on keeping it separate to maintain autonomy. An autonomous website with the network's own logo and special publications created some level of specialness for expats and their spouses within the organisation. Given the leanings of the industry towards reducing expat numbers however, this was neither helpful nor productive and only served to give the designated liaisons a say in our web strategies. Similarly, the network had a system whereby all former employees were given an associate status that allowed them to continue to access information about the various offices via the website. This was accepted as the way things had always been done, but had some serious implications for data security.

The main downside of the use of cultural resources in this way for GT, was that it contributed to a 'knowledge-is-power' mentality that affected overall knowledge-sharing in the department. In a sense, culture and knowledge hoarding existed in a mutually enabling cycle. The culture of GT enabled the influence held by experts and the experts in turn enabled this culture to their own benefit. Unconsciously, the discussion and action format of the AR study drew on the tradition of telling stories and using those stories to explain how and why things had been done in particular ways. Critically

examining the problems that arose from these experiences and attempting to find solutions, brought about change in a non-threatening manner. This was not done by design, but could potentially be a factor in why actors within the department felt amenable to the process of change. Indeed, various prongs of activity took place during the study that added to the narrative about GT's working practices. Team huddles, mentoring circles and a dedication to having more structured processes that could be identified in SharePoint, were not all directly linked to the study but were certainly inspired by our new approach to working.

5.5 Conclusion

This chapter has attempted to bring together the outcomes of the AR study outlined in Chapter 3, in light of concepts considered in the review of extant literature in Chapter 4. Based largely on Ipe's (2003) framework of factors affecting knowledge sharing, key issues considered were the prevailing culture in GT, motivation to share and opportunities for knowledge sharing. On reflection, the expert culture of GT – described by one team member as having 'little kingdoms' promoted a 'knowledge-is-power' mentality has been shown to be a factor in the diminished state of knowledge sharing. The interconnectedness of culture, power and knowledge sharing may have played a role in both the creation of the problem and the success of the solution. The AR process resulted in various actions being taken that improved knowledge-sharing in GT. The next chapter will include some post-project reflection and consider final steps for the resolution of this study.

Chapter 6 Reflections and design of a final cycle

6.1 Introduction

At various stages in this thesis, my own reflections and the reflections of the rest of the team have been highlighted to illustrate our thoughts and biases while the study was taking place. This chapter reflects on the project from the perspective of having had some time and distance to further evaluate the study. I will firstly highlight some biases and assumptions, then the successes and shortfalls of the study will be considered. Lastly a suggestion for a final cycle to tie up loose ends will be put forward.

6.2 Biases and Assumptions

The richness of AR lies in the ability to conduct inquiry with the understanding that practical knowing is dependent on context (Coghlan, 2011). The outcome of an insider action research project is influenced by the dynamics of the organisation and individuals being studied. A significant aspect of this is the perspective of the inside researcher. Kemmis (2008) points out the importance of situating oneself within the context of the study while understanding that this situation is a construct of changing social, cultural and economic values. For me, my situation and perspectives are linked to certain assumptions and biases that would have had an influence not only on my choice of study but also on my interpretation of events.

In earlier chapters, I mention that I critically examined my choice of AR as a means of solving GT's problem. I questioned my choice so as to be certain that I was not assuming a study of this type was best for the team, just because it fit in well with my own purposes as a DBA scholar. While I am certain that AR was the appropriate procedure for this project, a conversation thread during our final discussion session gave me pause for thought. Three key members of GT – Mabel, Bryan and I – had spearheaded the project because we believed a deeper understanding of *why* we do things was important for change. Katherine raised an interesting point when she questioned whether simply

being ordered to adopt a new way of working would have been quicker, even if we did not understand *why*. Although I still maintain that the *why* is important, I realise that I hold the assumption that understanding situations is more important than achieving things quickly. This is not a universally held assumption. Both Katherine and Sally work on the premise that the quicker a task can be fulfilled, the better for everyone. There is nothing wrong with either of these viewpoints but it does explain why some members of the team were more inclined to rush towards a solution than others.

In the context of both GT and the wider network, a bias that I needed to be aware of was my career background in a Western corporate setting. Having always worked in that type of environment, I do view it as efficient and orderly. GT and the network were founded by people who worked outside of the traditional corporate setting. Some of the inefficiencies of the network were a result of systems (or lack thereof) which simply did not sit well within the vision I had as manager of GT. This is a bias that was shared by my line manager and a few other key stakeholders and their confirmation of my bias meant I had to remind myself not to assume my way was best.

6.3 Post-project reflections

As noted in Chapter 2, an insider action research study has two projects running in parallel; a thesis research project and a core research project (Zuber-Skerrit and Perry, 2002; Coghlan and Brannick, 2013). When I left the GT team at the end of the fifth cycle, the core action research project had been successful in changing the way the team stored and shared knowledge. The specific objective of our project was to address the knowledge sharing issue. On a broader level however, my aim was to change the culture within the team that encouraged knowledge hoarding. The discussion sessions uncovered practical reasons for our behaviour, but also revealed various mental attitudes that fueled our actions. The review of literature served as a useful tool in giving some theoretical explanation of these attitudes.

Analysing our AR cycles from the perspective of the literature caused me to consider one of the challenges I had faced as a dual researcher. During the cycles, I on occasion

had to remind myself to give equal amounts of attention to the two projects. As a team leader with a limited amount of time in my role because of my impending relocation; I was sometimes more focused on fixing the problem in GT quickly, than on analysing underlying issues through an academic lens. On reflection, I was forced to consider whether I was continuing the historical behaviour of GT by trying to establish my own legacy before moving on. A key aspect of the traditions of GT was the culture of influential people who remained linked to the network because of their past knowledge and/or contributions. Was I unconsciously exhibiting the same behaviour even while attempting to change that very culture?

Another aspect of the study that required further examination was the outcome of the cycles. Qualitative research is complex and made up of many threads. A qualitative researcher must accept that it is rarely possible to conclude with an obvious and universally 'right' solution that ties up all loose ends neatly, as there may be multiple outcomes to each inquiry (Creswell, 2013). On a strictly technical level, I am aware there are aspects Sharepoint that will require ongoing development. Furthermore, despite the improvement in knowledge sharing, there are elements of the core research project that perhaps could have been further enhanced by the knowledge gained from the thesis research project. Had I remained in the role, some of the insights regarding organisational culture – especially the concept of drawing on culture as a flexible toolkit (Swiddler 1986; 2001; Rindova, Dalpiaz and Ravasi, 200; Weber and Dacin; 2011) could have been introduced to add depth to our discussions. It would have been interesting to gain the team's insights on how a department which leans so heavily on history and tradition could use those cultural resources to improve our working practices.

The rest of this chapter examines what steps could have been taken to add this layer of depth. In short, what follows is a design for a final cycle based on what went well and what required further insights from the existing cycles.

6.4 What went well?

The most successful element of the core research project was the transition from haphazard (often non-existent) recording and sharing of knowledge to a more structured system using SharePoint. The creation of the platform also led to the review of various documents and procedures that made our working processes more efficient. A large part of our evaluation and reflection focused on ways to improve the application – both in terms of how we as users adapted to it and about technical difficulties with the system. Mabel worked alongside the company's IT team to improve glitches in the system based on the team's feedback. Once SharePoint became more user-friendly, access to knowledge about key processes made a distinct difference to the day-to-day roles of the advisers. One aspect of an adviser's role in GT, is on boarding new Focal Points in the Satellite offices. This is done virtually via an internal phone and screen-share system. There are various steps involved and specific information about the location, local HR, remuneration and the scope of the job are discussed in this initial call. Further calls involving local HR take place later. Prior to the use of SharePoint as a repository, key information relating to this on boarding process was not easily accessible. There were also no formal records of interactions between the Satellites and their advisers. For newcomers to GT who had no mentally stored history of their own about these locations, this could often result in awkward and ineffective initial phone calls. Bryan found himself in this position when he undertook the on boarding of a Focal Point who had extensive experience within the network. His own lack of experience was evident as he was ill-prepared for the phone call. After the AR study, not only could advisers find out the relevant information about the location in SharePoint, they also had access to basic details about previous interactions with the offices and their HR and business contacts. This helped to improve our relationships with various stakeholders.

Another positive outcome was the team spirit that came from engaging in candid critical discussions and reflecting on the way we worked as a team. Reason and Bradbury (2008) argue that within small groups such as ours, AR allows people to make sense of their small world and take appropriate action to improve. The democratic nature of AR (Greenwood and Levin, 2007; Coghlan and Brannick, 2013) cleared the way for team members to think about their own contributions to our department. It also meant that

one of the original aims of the study - empowering the team to be in control of the change initiative – was realised. During the discussions, although I steered some of the discourse by asking questions, all members of the team played an equal role in offering their thoughts on topics, deciding on solutions and evaluating our actions. All the actions taken relating to SharePoint and our procedures were suggested by the team. One clear advantage of this was that each team member could make changes that worked best within their individual functions. Katherine re-examined some of the processes relating to compiling the annual report and our flagship magazine. The advisers also benefitted from the creation of what Sally referred to as a ‘harvesting document’ that helped keep track of development and interactions between the Satellites and GT.

6.5 What could have been improved?

As noted earlier, the time constraints imposed by my relocation resulted in an early focus on finding solutions rather than taking time to discuss issues around the problem. This was evident in the first cycle where Sally offered a practical solution to a specific problem of recording knowledge relating to our stakeholders. The solution was useful, but as a group, we moved away from discussing why we had formed certain habits. We needed to address this to stop ourselves from repeating old behaviours. Instead, that discussion glossed over the underlying issue. I did address this in subsequent cycles, however our self-imposed need to ensure that I did not leave the team without a well-packaged solution to our problem, did inform some of our decisions and actions. This was perhaps inevitable, given the situation. We all discussed the possibility of future virtual discussions which I could have organised remotely if necessary, however I was conscious that making further changes to GT’s working practices could have been insensitive to the new manager who had a different area of focus for her tenure.

6.6 Design of a final cycle

A future cycle should include evaluation and reflection on how the system is working now, and a discussion on how behaviours have changed. The existence of a knowledge repository will not in itself change attitudes to knowledge sharing (Hendriks, 1999). What was apparent from the literature review was that people and their actions and motivations within organisations, play a critical role in the success of knowledge sharing (Duan et al, 2010; Argote and Ingram, 2000, Ipe, 2003; Szulanski, 1996; 2000). For GT, the interplay between departmental culture and power has an effect on the way people use and share knowledge. Much of this is learned behaviour that fits in with the way things have always been done. There is a positive aspect to this. Presumably, new recruits to the team who joined after our study should know no other way of sharing knowledge if this new culture has successfully replaced the 'little-kingdoms' culture. Existing team members should have transitioned from relying on experts to a more structured approach where explicit knowledge can be easily accessed in SharePoint and tacit knowledge can be shared in forums like the team huddles. A simple means of examining how far this change has gone would be to study changes in behaviours related to one significant process – such as the on-boarding procedure for new Satellite Focal Points. This process includes some standard steps as well as the passing on of pertinent knowledge relating to specific locations. An evaluation of the current process can be compared with the previous system. Examining these behaviours would be the starting point of a new cycle.

One of the topics that should be included in this evaluation of behaviours is whether the narratives surrounding the network's traditions have remained a significant influence on GT staff. As noted in Chapter 5, cultural resources such as these narratives and the creation of a separate identity through special network branding served as vehicles for maintaining a specific way of behaving in GT (Rindova, Dalpiaz and Ravasi, 2001). The knowledge that came from the narratives surrounding expatriation, were instrumental in enabling the team's reliance on gurus. The team and various stakeholders hailed our change project as a new start for GT and the beginning of a different way of conducting our affairs. It would be interesting to see whether the narrative surrounding our change project was now being used as a means of maintaining a new status quo that

discouraged knowledge hoarding. During our discussions, Mabel noted that over the years, each new GT manager had brought a new perspective and/or project to the role that would eventually become their legacy to the network. These projects included professionalising what was originally a loose coordination of Satellite offices, turning the network into a unique brand within the parent company - complete with its own separate logo and website - and the creation of a coordinated client information database. These have all gone down in GT folklore as significant moments in history that shaped the story of GT. What effect our change initiative has on this story should be explored in the future.

Figure 6.1 below is a pictorial depiction of the suggested steps of a final cycle. It highlights potential areas of consideration, action and reflection.

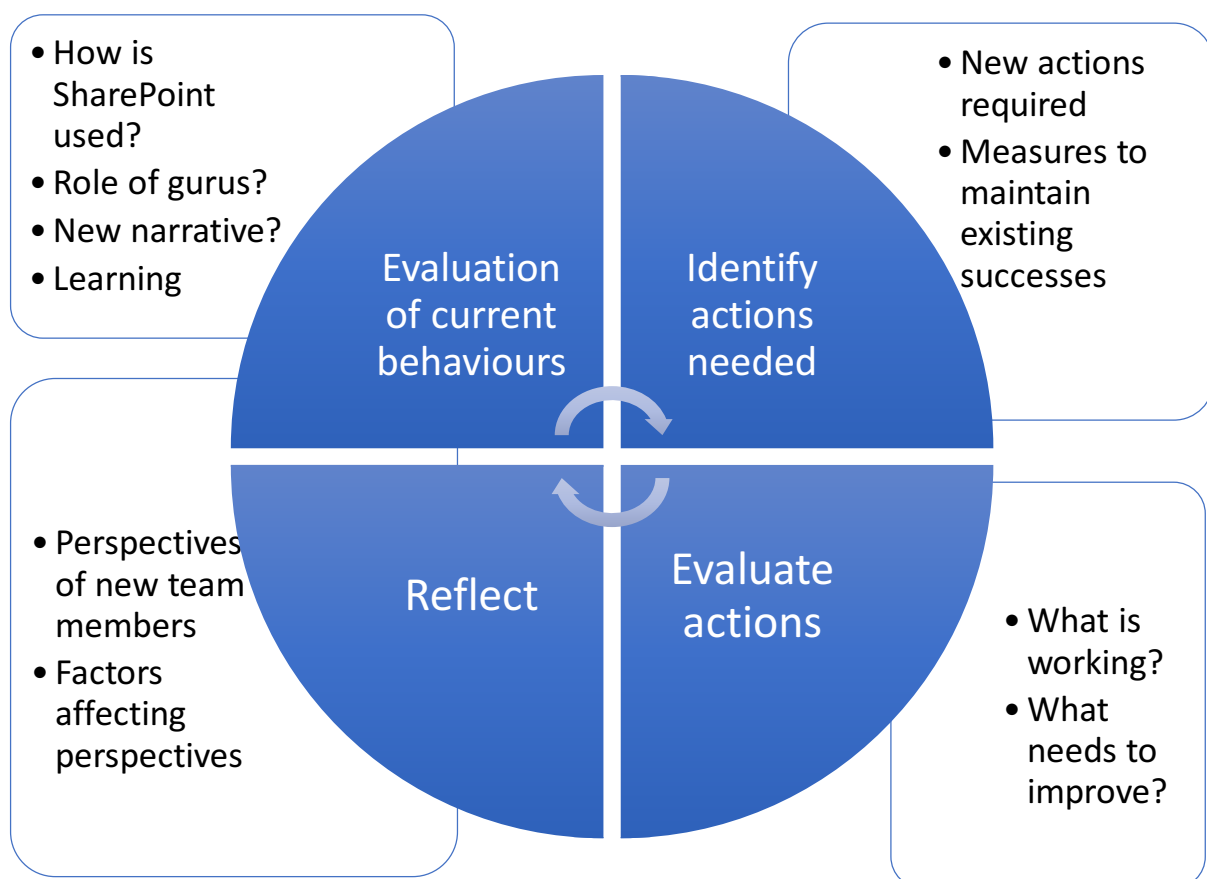


Figure 6.1 – Design of final cycle

The top left segment is the starting point. It begins with an evaluation of current behaviours as compared to previous ones. Questions to be asked include; what has

changed? How is SharePoint being used? What measures are being taken to ensure it does not turn into another black hole? Has the new system been set up in a way that is sustainable? Has information become more easily accessible? How is tacit knowledge now shared in the team? What role do gurus now play in GT? How has GT's narrative changed and how does the history of the network inform behaviours now? Lastly what areas of learning have come from this change?

The top right segment is the second phase, which should involve acting on issues arising from the first discussion. My recommendation would be to identify two separate areas of activity. Firstly, problem-solving actions such as technical adjustments to SharePoint, tweaking of systems and behaviours to create a good fit for the current team and the introduction of new procedures as determined by shortfalls in current knowledge sharing behaviour. Secondly, where new ways of working resulting from our project have proved to be successful, measures need to be taken to ensure that these standards are sustained. For example, could the informal team huddles be turned into a more structured forum for the sharing of knowledge? Alternatively, if the informal nature of these huddles serves as a ripe breeding ground for knowledge generation and sharing, then this should be maintained but knowledge generated should be efficiently stored. Lastly, could measures be put in place to ensure that future staff, stick to the metadata file management approach within SharePoint as initiated by Mabel? This would ensure that employee turnover does not create similar problems to the black hole scenario.

The bottom right segment represents an evaluation of actions taken. A mutually agreed period should elapse to allow for effective monitoring and evaluation of these actions. In previous cycles, we allowed periods of one month to six weeks to give team members an opportunity to adapt to new habits. As noted previously, this was not always enough time to develop new behaviours. Thus, the potential for individuals to react slowly where change is concerned, should not be ignored when planning this cycle. Evaluating actions allows the team to adapt their solutions to suit current situations. GT and the network are constantly evolving and hence the effectiveness of solutions will be determined by the context (and behaviours) of the day.

The bottom left segment is a reflection on the entire process. In GT, this reflection session is particularly useful because of the constant changes in both procedures and staff. For example, after I left the department, the procedure for collating and delivering the annual report was changed as part of cost-cutting measures. Thus, the person who inherits Katherine's role would be required to follow new procedures. Some of the frustrations Katherine faced in her role were eliminated due to the change. Katherine's reflections on our actions would therefore be different to her successor's perspective. Another element that should be considered during the reflection phase is the factors that currently affect the team's perspectives and behaviours. For example, how secure are people's jobs? Are there other changes in the department and in the wider organisation that affect how the team approaches knowledge sharing? Identifying such factors and recognising their effects on the team's behaviour could help to alleviate some of the negative impacts of issues such as job insecurity and departmental power dynamics.

In a sense, the constant state of flux in GT, lends itself to the creation of ongoing cycles of action and reflection. These would not have to take the form of an official change project such as my DBA study. However, an awareness of factors affecting each incumbent group could be significant.

6.7 Conclusion

This chapter has examined the AR study in GT. It has specifically considered elements of success and areas where the core action research project could have benefitted from further critical reflection based on elements uncovered in the thesis research project. This has been illustrated via a proposed design for a final cycle of inquiry to maximise the benefits of the two projects.

Chapter 7 Conclusions and implications for management practice

7.1 Introduction

This chapter provides a summary of the process and outcome of this AR project. It also suggests some ways in which the findings may be beneficial for practice and considers both the limitations of the research and a potential area of further inquiry.

7.2 Fulfilling the aims of the research

This study was initiated in response to a problem of decreased knowledge sharing within GT - a team in the HR department of a large energy firm. At the start of the study the following questions were outlined as being the drivers of our inquiry:

Why do we have a problem sharing knowledge in this team?

How can we improve this situation?

What factors affect our desire to make knowledge sharing the norm in GT?

In addition to these questions, a key objective was to collectively address these issues to ensure that the team took ownership of any changes that came about.

To answer these questions and foster collective interest in changing the status quo, I embarked on an insider action research study which involved five cycles of discussions, action, evaluation and reflection. Transcripts of our discussions were analysed for emergent themes and the data harvested was re-analysed to further hone in on recurrent themes. A review of extant literature was then conducted to gain further understanding from an academic standpoint, of factors that affect our situation. Using a conceptual framework created by Ipe (2003) as a foundation for exploring factors that affect knowledge sharing, prominent themes from our discussions were studied in

relation to existing literature. The themes that emerged were the culture of the work environment, motivation to share and opportunities to share – see Figure 7.1 below.

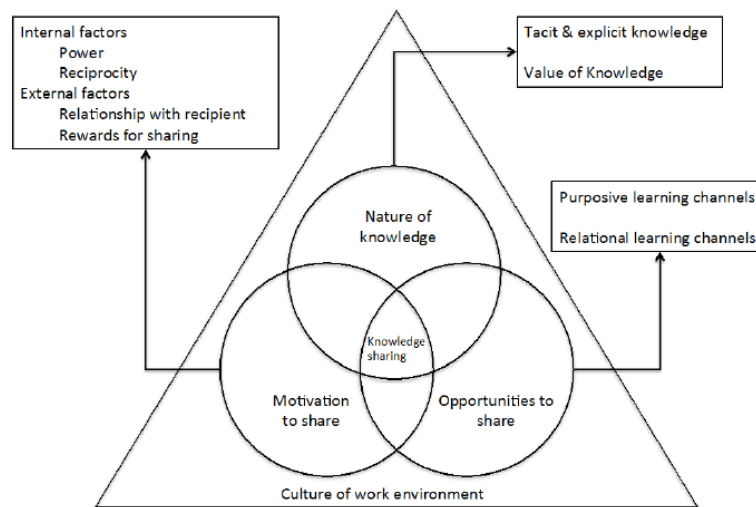


Figure 7.1 – Factors that influence knowledge sharing between individuals in organisations (Ipe, 2003, p.352)

What did our discussions and the literature reveal with regards to the questions posed at the beginning of the study?

1. Why do we have a problem sharing knowledge in this team?

The key point that stood out within the overarching themes is the way in which organisational culture can create an environment that encourages people to hoard knowledge because of the power that comes from being an expert in a field. The study acknowledged that historical factors in GT had created a culture that allowed certain individuals to thrive on being gurus in their field. The notion of drawing on culture as a flexible toolkit from which individuals can achieve their own agendas (Rindova, Dalpiaz and Ravasi, 2001) makes sense in the world of GT. There is interplay here between the culture of the work environment and people’s motivation to share and their motivation to change unhelpful behaviours. In this context, these elements feed off each other. Individual staff tenures in GT do not change at the same time, thus there is always a mixed crop of older and newer team members, which affects team dynamics. Longer-

serving staff were sometimes wary of the behaviours displayed by new recruits. For example; Rihanna joined the team with the aim of encouraging the locations she mentored to be more professional and accountable. This was welcomed by management but did not necessarily sit well with staff (past and present) who were accustomed to a more informal way of working. As a central HR hub for the network, we had often spoken about making the Satellites more accountable, yet some advisers balked at doing what was required to make this happen. In short, it did not sit well with the network's 'family-friendly' narrative. Similarly, Brian began to overhaul GT's training material to create research and evidence-based learning schemes that had structure and purpose grounded in HR theories. This was an improvement on many of the materials that had been used in the past, which had simply been thrown together by a member of staff tasked with the role of supervising training. Brian's method was a change for the better in terms of the quality of learning being offered. Despite this, it was considered by some to be veering away from the ethos of the network. Interestingly, the introduction of informal measures for sharing knowledge in a more relaxed manner – huddles for GT and virtual mentoring circles for Satellite focal points - were welcomed without question. Ipe (2003) does suggest that sharing tacit knowledge is most successful when done in an informal setting. Was it also more easily assimilated in GT because it was an approach that was historically most welcome?

Another perspective that we did not consider in our discussions, but which is highlighted in the literature review is the notion of whether individuals and groups perceive themselves to have the power to change what they do not like in an organisation. Coghlan and Brannick (2013) note that there is a subversive quality to the act of researching within your own organisation. Delving into the mechanisms of an organisation gives actors a power to reveal truths that they may have been blind to in the past. We had attributed some of the blame for our problems to the genesis of GT and the guru culture, but this was only a small aspect of a wider problem within the organisation. In our discussion sessions, we talked about poor knowledge management across the company and acknowledged that certain HR policies affected our working practices. Yet, prior to the study, we simply saw these as the daily hurdles associated with the job. Friedman (2001) advises that as part of navigating organisational politics, insider action researchers must constantly question the rationale behind actions and

structures. So perhaps when we ask why we have a problem sharing knowledge in this team, we should recognise that GT operates within the policies and structures of Interco and these structures fostered the existence of a network where gurus were needed. The benefit of our team being in control of our own change initiative was that we were now able to pin point unhelpful patterns and move away from them. Prior to this, we accepted the status quo because we knew no better.

2. How can we improve this situation?

While this AR study has a theoretical foundation, it was also focused on the real-world problem that drove the project. Actions taken because of our discussions centred on creating streamlined procedures using SharePoint as a knowledge repository. The refining of our understanding and usage of SharePoint was one of the main topics in the evaluation and discussion sessions in later cycles. In the simplest of senses, SharePoint solved the problem of an absence of a credible opportunity to share knowledge. However, making the mental shift from a knowledge hoarding culture to one where people were actively expected to let go of entrenched habits and use the repository took some doing. Various team members – including myself - struggled initially with the making this mental shift. We had always taken for granted that being individual fountains of knowledge was simply the way we went about things in GT. The solution lay in the open discussions of the AR cycles. Newer recruits to the team pointed out how the knowledge hoarding culture created ‘little kingdoms’ which was unhelpful to the efficient running of the department. Furthermore, the open and democratic nature of the project forced us all to examine our behaviour and invest time and energy into making the new system work.

A key outcome of the study was that knowledge became more easily accessible through SharePoint. Previous reliance on the black hole and people’s memories led to much time wasted when trying to access information. For a department where most of the staff work on a part-time basis, every hour is precious. In addition, a well-structured and regularly updated repository ensured that stored information was current and correct. When Satellite offices asked for information, there was no longer a quick scramble to check various sources to determine current policies. The drive for better structures and

less hoarding of knowledge by individuals had a knock-on effect on the network. Advisers encouraged their focal points to simplify their own procedures and create well-organised structures. Mabel eventually introduced a collaboration site within SharePoint where the Satellites could share and access information. This was particularly useful for sharing the anecdotal solutions that had long been kept within the arsenal of knowledge only available to experts. Most importantly, as a department, GT presented a more efficient front to our stakeholders because as a collective, we could function effectively even in the absence of individual members of the team.

3. What factors affect our desire to make knowledge sharing the norm in GT?

The culture of the team had never required us to be accountable for how we stored or shared knowledge. Changing our way of working required a much bigger organisational shift than we originally anticipated. The historical context of GT not only enabled a knowledge hoarding culture, but also created an unusual belief that GT (and what it stood for) was a phenomenon that was bigger than any of us. Thus, while previous incumbents may have been unhappy with the status quo, changing it would mean being engaged enough to see oneself as more than just a temporary custodian of the GT legacy. This AR project helped the existing team and some key stakeholders to understand the importance of making that change.

7.3 Limitations

This study involved the working practices of a group of six people in a small HR department. The department is unique; not only in the company itself, but also when compared to competitors in the industry. Based on anecdotal evidence from HR teams of companies with similar levels of expatriation, it is unusual to have a department solely dedicated to supporting expats and their families - particularly one that was originally created by the expat families. The issues that existed in GT were just as unique as the team itself, because the 'little kingdoms' power dynamic was directly linked to the historical and cultural context of the department.

GT's unusual circumstances do affect the findings of this study and similar studies may have slightly different outcomes based on their specific contexts. However, one aspect of GT that is not uncommon to many organisations is the use of fixed term contractors. The use of short-term contractors is often a macro level business decision taken by organisations that cannot be changed at the departmental level. Like GT, departments that are unable to change this element may need to promote behaviours that encourage knowledge sharing in teams with similar turnover issues. Thus, each organisation may have to navigate the specific contexts within which they operate, to achieve similar outcomes as GT.

7.4 Actionable knowledge generated

Despite the aforementioned limitation, it is the very contextual nature of GT's problem that I believe can be a platform for learning for other organisations. Coghlan (2011) argues that practical knowing differs from situation to situation. What remains the same in all contexts is that people's actions are based on their understanding of their specific world. It is this awareness of the specifics of individual organisations that can provide a key to problem-solving. AR studies that aim to address practical issues within organisations could adopt a path of inquiry that is visually represented in Figure 7.2:

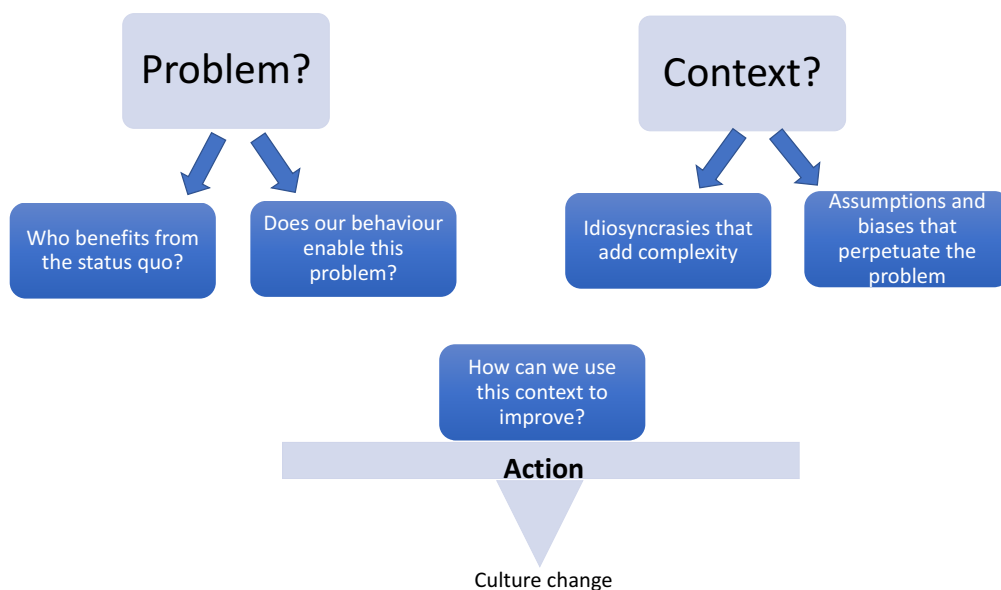


Figure 7.2 – Path of inquiry for problem-solving via culture change

This path of inquiry focuses on making sense of organisational problems in a way that is rooted in the situation of the organisation. A team would first need to identify their perceived problem and determine who currently benefits from the situation and ascertain whether unconscious behaviours either enable or augment the issue.

Determining who benefits from the status quo helps us understand who is likely to be most resistant to change. Examining behaviours puts a spotlight on areas for potential action. The second element would be to consider the specific context of the problem and the organisation. Each company has its complexities that make solutions easier or harder to address. Within this context is the notion of biases and assumptions. In our organisation, unhelpful behaviours were assumed to be appropriate because they had always been accepted and it was assumed that this way of working existed for a reason and hence should not be changed. In fact, the cultural/historical context of GT made sense when the department was created but it was no longer promoting efficient working practices and was ripe for change. Once these elements are identified, the team or manager can begin to determine what actions can be taken to elicit change.

Additionally, the dynamics of politics and structures that promote certain behaviours in an organisation need to be considered when examining who benefits from the problem and when considering the idiosyncrasies that add complexity. Buchanan and Badham (2008) stress the importance of an insider action researcher being able to wear two hats. They would need to be the leaders of the change initiative and the 'face' of the action. They would also have to be politically savvy and discover how to influence and manipulate key figures from behind the scenes. Gaining the power that allows actors to make real change in organisations requires being aware of who and what has the greatest influence on the organisation's structures (Lukes, 2005; Buchanan and Badham, 2008; Coghlan and Brannick, 2013). In short, a team adopting the model in Figure 7.2 would need to do more than simply acknowledge that there is a problem and jump ahead to try and fix it. They would need to immerse themselves into the rich context of their problem, their department and their organisation if they intend to make significant changes.

In the case of GT, the entire team needed to be invested in understanding how our culture was hindering knowledge sharing before a better system could be put in place.

In a different context, the solution may hinge less on historical power dynamics and may instead be linked to leadership or rewards and incentives. As no two situations are the same, researchers following such a path of inquiry could make modifications and take action based on their unique context (Coghlan, 2011).

7.5 Area of potential further study

Finally, various themes arose during our AR cycles that were beyond the scope of our needs but which could be useful for scholars examining similar situations. As I reflect on our project, the area that stands out the most to me, is the role of situated influencers within an AR group. The need for people who serve as catalysts for change is not a new concept. Kotter (2008; 2012) highlights the importance of influencers in any change project. For an insider AR project however, the focus is usually on the role of the inside agent and how their duality affects the project. In our study, while I took the lead as manager and researcher, Mabel was the driving force of change both technically and in terms of influencing the team's thoughts. With the greatest historical knowledge of GT, she could objectively analyse the pros and cons of our working practices and steer group thinking. In the current age of social media where social and cultural influencers are proving to be increasingly significant to individuals and businesses, it could be beneficial for organisations to discover what effect in-house influencers may have on AR-focused projects.

7.6 Leaving a legacy

On reflection, I see the discovery of the team's voice as an extremely positive legacy to have left behind. There were standout characters like Mabel who found her voice in our context and went on to use it to effect change across the network and in other departments in HR. Yet even those who found their voices on a smaller scale were to be commended because this was the first time this team had believed that they had the power to change what they did not like. Gaventa & Cornwall (2008) highlight a notion from feminist literature of actors accepting their 'powerlessness' and simply conforming to the norms and practices around them. The AR journey was not smooth

and it took practice and a mental shift for the team to go beyond liking the change to leading the change. By the end of the process however, they were questioning more elements of the way we work and forging greater relationships with other HR departments which helped to improve our standing in the wider organisation. I would like to think that my successor inherited a team that was much more engaged than previous had been.

Chapter 8 Reflections of a scholar practitioner

8.1 Introduction

This final chapter highlights personal reflections on my journey as a DBA student. It will consider my position within the thesis and action research projects and analyse personal biases and assumptions that affected the study. The chapter will also look at what lessons I have learnt, both as a scholar and a practitioner. Finally, it will consider how my DBA journey has impacted my career and my perspective on management and learning.

8.2 Becoming a scholar practitioner

I was already a DBA student when I took on the role of manager in GT. At the start of my DBA journey, I was managing a non-profit organisation that focuses on improving literacy and economic skills in underprivileged communities. Prior to this, the bulk of my career had been in the field of media - starting out in newspaper advertising, going on to become a broadcast journalist and later taking on a role as a communications manager. The move to non-profit management and later to the energy company which formed the basis of this thesis, was the result of my family's international relocations. I chose to undertake a DBA as a means of consolidating and building on the leadership experience I had gained in these varied industries. For most of the module portion of the DBA, I focused on using the insights I gained from the course to improve the operations of the non-profit. As co-founder and operations manager, I was personally invested in the success of the organisation and I sought to navigate leadership challenges in an environment that was culturally different to my previous roles. Most of my fellow students on the DBA modules were from commercial industries and while this was not a problem as far as the course was concerned, it did mean that their perspectives on issues such as staff motivation did not always align with mine. For example, their anecdotes suggested that remuneration, recognition and personal fulfillment played key roles in motivating staff in the Western commercial environment. In the country in which I was living as an expat at the time, these factors were

important, but other factors such as family expectations, gender, religion and community status also heavily influenced people's attitudes to work. Thus, I often found myself approaching discussions from a different perspective to others.

My original intention for the thesis project was to explore issues surrounding motivating teachers in the government school system as this was a major problem for our charity. One aspect of our work was training primary school teachers to use literacy teaching methods that made reading easier for children in lower income communities. This area of study was one I had vaguely considered as it was a recurring problem, but as I was still undertaking modules, I made no significant inroads into studying this topic. I was however certain that no matter what topic I eventually chose, my focus would be on how people's collective behaviours affected outcomes in organisations.

A move to a new country brought with it a new role and a new set of departmental hurdles to overcome. A key challenge was the issue of diminished knowledge sharing. My initial aim was simply to find a practical solution and continue with other projects. I assumed this was a clear-cut case of an absence of adequate knowledge storing systems. I was not wholly sure this problem required any academic grounding for better understanding and indeed, throughout the process of this study, I have had to constantly remind myself of the importance of maintaining a balance between academic rigour and organisational relevance. Having started working in the team on the same day, Bryan and I frequently discussed our thoughts on the various challenges in GT. We agreed that the use of gurus was odd and unprofessional, but we also agreed that there would be much resistance to any kind of change in the department. At that point in time, we still viewed GT and its practices through the eyes of outsiders. As we increasingly became entrenched in the ways of the team, we also adopted the same habits – despite our critical minds recognising on some level that there was a need for change.

The decision to use this problem as the basis of my thesis and action research study was not taken lightly. I questioned my motives and wondered whether embarking on the project was simply convenient for me as a scholar. Would there be any real benefits derived as a practitioner? More importantly, would my team and our working practices be improved at the end of the project? It was helpful that all the team members were interested in the idea of a study and all were keen to contribute in some way to

improving knowledge sharing. In truth, the final deciding factor for me was the awareness that we had a unique group of people who had less of a romanticised view of the network than others had before them. Hence, they were prepared to question the way we act and not just go with the flow. I had been given a fortuitous window of opportunity with the right team.

8.3 Reflections on my role in the study

I found the exploratory nature of action research both refreshing and unsettling. The participatory aspect of the discussions falls in line with my personal views on management. I have always leant towards less hierarchical leadership structures though my overall belief is that a leader's style should be adaptable to specific situations. Elements of action research that I found daunting however, were the open-ended and iterative nature of it. What if no solution was found after numerous cycles? How messy could a series of actions and reflections become? With a group of strong personalities collectively involved, how easily would we decide on actions and whose reflections would we be examining? These were some of the concerns I had at the beginning. Indeed, my impending and unexpected relocation, which came about while the cycles had already begun, served to increase my concerns, although with hindsight, this proved to be less of a challenge in practice and more of a mental challenge for me.

Had I stayed on in the role of GT manager, I would like to think that I would have continued to use elements of action and reflection cycles to ensure that we continued to grow and improve as a team. This may however be an idealistic view of the process. My team welcomed the study and were happy to participate, but I am under no illusion that they were swayed to some extent by the fact that I was their boss. We had a good working relationship and they all happily signed ethics agreements and discussed with my line manager about their willingness to take part. Open discussions were the best approach for a team like ours where people enjoyed giving their input. They were one hundred per cent behind the study, but it was still a project introduced by me. It was up to me to explain the scholarly process to them and there were a few moments where I had to provide guidelines so that we avoided exploring numerous tangents or fell into the trap of focusing just on solutions without allowing room for evaluation and

reflection. In general, the reflective element of a change process does not always come naturally to a time-poor executive. I was keenly aware of the time constraints that the team faced. Most of the team worked part-time hours and there was only one day a week where everyone was in the office at the same time. I was the only team member who saw the different team mates on all the different days of the week. This meant setting boundaries on when and where we discussed the issues being considered in the study. I also sometimes had to curb the enthusiasm of advisers who wished to pass on unevaluated methods to the Satellite offices because we had experienced minor successes in certain areas.

It is fair to say that I had not considered all the above prior to the study. The first discussion session was educational because although I had explained the nature of action research and given what I believed was a good overview of the practical academic project that would exist in parallel, it became clear that I needed to explain this in more depth. There were also times in the early cycles where I felt conflicted between giving either too much or too little steering to our discussions. From this vantage point however, I see that even those conversations that seemed irrelevant served to give me a rich understanding of the personalities involved in the study as well as an insight into why they would react in specific ways to the change initiative. This in the end, was one of the benefits of an exploratory study with participants who were directly affected by the outcome of the project.

8.4 Learnings

Perhaps the greatest insight that I gained from this study was a better understanding of the complexity of organisations and the people within them. Ipe's (2003) model which has been referred to extensively in this thesis, suggests that the factors that affect this specific issue of knowledge sharing are numerous and inter-linked. As noted in Chapter 7, each organisation may have idiosyncrasies that make one element a greater trigger than others, but it is unlikely that one single change would fix a department's problems. This has been a valuable lesson for me as a manager because I naturally tend to look for single-source solutions and organisations like ours which operate in constant state of flux are not so easy to fix. During my final months as manager of GT, I was less focused

on striving to put out as many fires as possible and became more focused on choosing the most pertinent issues, understanding the roots of the problems and collaborating with others to reach a solution. I have always had a collaborative style of management so that did not change significantly. What did change was my understanding that my team needed to believe that their contributions were valued. Giving them more autonomy and encouraging them to find areas in their territories that could be improved, had the desired effect of increasing trust and effectiveness.

As a scholar, there are two key skills that I am happy to have improved upon as result of this study. Conducting a literature review has always been a daunting task in my past academic endeavors and during the DBA modules, it was the exercise I dreaded the most. This was mainly related to the time involved in finding relevant literature and giving a critical interpretation of them. This thesis adopts a less than typical approach whereby the literature review took place after themes had been identified during the cycles. I believe this to be a good approach for an exploratory study such as this, which does not attempt to prove or disprove given hypotheses. While I could not in good conscience say I developed a deep affection for conducting literature reviews, I was pleasantly surprised at how the back drop of the cycles helped to give a clearer focus on gaining some understanding of our problem from literature. The second skill relates to the analysis of qualitative data. The coding process is also a labourious one, however sifting through the rich data generated from our discussions and survey questions was useful and helped to consolidate my opinions about the discussions – especially as the data analysis process took place a few months after the final cycle due to my relocation.

8.5 Impact on my career and conclusion


Upon relocating to another new country and spending a significant amount of time focusing on the thesis project, I found that my various experiences of management, communications and action research piqued an interest in pursuing an academic career. Primarily, this was based on my own love of learning but also on my interest in passing on the skills that I have acquired in the varied industries in which that I have worked. I am now teaching in two units. One is aimed at improving business communications for international postgraduates and another is focuses on communication in practice for

local undergraduates. An element that I have brought with me to this new role, is the understanding of the importance of student engagement. I consistently incorporate learning activities aimed at involving the students in their learning and ensuring that they have an interest in their classes. This has been influenced by my observation of the effects of the AR study on our team. Becoming an academic was an unforeseen outcome of pursuing a doctorate in business administration yet it now feels like a natural fit given all my experiences. In future, I plan to get involved with the use of action research as a tool for learning in practice if such channels are available in the institution.

This chapter has given an overview of my journey as a DBA scholar practitioner and considered both the positives – such as areas of learning – and challenges that involved in this space. Ultimately undertaking this study has consolidated my experiences and led to a career change which I believe has a promising future.

APPENDICES

Appendix 1: Participant consent forms



Committee on Research Ethics

PARTICIPANT CONSENT FORM

Project Title: Exploring Barriers to Knowledge Sharing In An Expatriate Support HR Team

Researcher: Effie White

Please tick boxes and sign if you understand and agree

1. I confirm that I have read and understood the information sheet which pertains to the above study. The researcher has provided me with information both verbally and in writing, that gives me a clear understanding of the purpose of this study and I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.
2. I understand that my participation is voluntary and that I am free to withdraw from the action research team at any time without giving any reason. In addition, if I wish decline to be involved in certain aspects of the study I am free to do so. I have been assured that withdrawing from the study will not affect my rights or my position within the organisation.
3. I understand that, under the Data Protection Act, I can at any time ask for access to the information I provide and I can also request the destruction of that information if I wish.
4. I understand that I should not participate in this study if I know of any physical or psychological reasons that prevent me from doing so.
5. I understand and agree that my participation may be audio recorded and I am aware of and consent to your use of these recordings for the purpose of gathering information which will later be transcribed.
6. I understand that confidentiality and anonymity will be maintained and it will not be possible to identify me in any publications
7. I understand that all conversations and data must be kept confidential
8. I agree to take part in the above study.

Version 2.0
August 2015

1



_____	_____	_____
Participant Name	Date	Signature
_____	_____	_____
Name of Person taking consent	Date	Signature
_____	_____	_____
Researcher	Date	Signature

Thesis Supervisor:
Name: Dr Paul Ellwood

Student Researcher:
Name: Effie White

Appendix 2: Mid-cycle questionnaire

THOUGHTS ON KNOWLEDGE MANAGEMENT ACTIONS TO DATE

- 1 So far do you find using Sharepoint to be an improvement on previous ways of sharing knowledge in GT?

Yes.....(please explain why briefly)

No.....(please explain why briefly)

- 2 What challenges do you face when using the GT Sharepoint site?

- 3 What are the benefits of using the site?

- 4 What would you change about our current knowledge management systems?

- 5 Please give some reflections on how the process of talking about knowledge management has influenced your view on the subject within the context of GT.

Appendix 3: Research data analysis (excerpt from Excel document)

Source #	Note #	Participant	Data Type	Date	Place	Notes	Theme 1	Theme 2	Overarching Theme	Observation	Suggestion	Solution	Action	Reflection
1	1	Sally	Discussion	14/01/2016	Meeting Room	Following on from Sally's first comment – an ongoing solution to our knowledge problem in the locations. This became an actionable suggestion	Power		Power					
1	2	Sally	Discussion	14/01/2016	Meeting Room						Sharepoint solution wiki	Off-boarding document		Create an ongoing document that includes on and off-boarding details
2	1	Bryan	Discussion	14/01/2016	Meeting Room									
3	1	Mabel	Discussion	14/01/2016	Meeting Room		History/Context							
6	1	Effie	Discussion	14/01/2016	Meeting Room		History/Context	Expectations						
1	3	Sally	Discussion	14/01/2016	Meeting Room		Perception/Bias	Context						
4	1	Rihanna	Discussion	14/01/2016	Meeting Room		The way we work	Professionalism	Organisational culture					
1	4	Sally	Discussion	14/01/2016	Meeting Room									
1	5	Sally	Discussion	14/01/2016	Meeting Room						Focus on harvesting information			Creation of a harvesting document
2	4	Bryan	Discussion	14/01/2016	Meeting Room	Consequences of inaction	Preparedness							
5	1	Katherine	Discussion	14/01/2016	Meeting Room	This is important - keep it within GT								
3	2	Mabel	Discussion	14/01/2016	Meeting Room	Triangle of GT, locations and HR								
1	6	Sally	Discussion	14/01/2016	Meeting Room					Good insight on how wrong GT had been in their approach with the locations				
2	3	Bryan	Discussion	14/01/2016	Meeting Room									
2	4	Bryan	Discussion	14/01/2016	Meeting Room						Focusing on GT because it's harder to include (poll) the locations			
1	7	Sally	Discussion	14/01/2016	Meeting Room						Use mentoring and best practice sessions to filter down changes			
4	2	Rihanna	Discussion	14/01/2016	Meeting Room						One-way KT then 2-way KT using the knowledge repository as a platform			
3	3	Mabel	Discussion	14/01/2016	Meeting Room	"Each one had a different way of doing things. And maybe someone was more talented in one direction than another. And if that was the case, then that was just unfortunate on the people they were looking after."	History		Organisational culture					
1	8	Sally	Discussion	14/01/2016	Meeting Room		The way we work		Organisational culture	Interesting observation about the way things were in GT				
2	5	Bryan	Discussion	14/01/2016	Meeting Room					Interesting observation that highlights Bryan's ability to reflect in action				
2	5	Bryan	Discussion	14/01/2016	Meeting Room	"what you can't change is how turnover affects institutional knowledge"								
2	6	Bryan	Discussion	14/01/2016	Meeting Room	This is a good suggestion but it's out of our hands. These statements by Effie and Mabel – Source 6 note 3 and source 3 note 4 are important observations/reflections on what underlines our thought processes at the time and also highlights the complexity of introducing new ideas when historical factors are important.	History/Context	Perspective	Organisational culture					
3	4	Mabel	Discussion	14/01/2016	Meeting Room	See note above								
6	2	Effie	Discussion	14/01/2016	Meeting Room	Restoration	History/Context				Harvesting document	Harvesting Document		
1	9	Sally	Discussion	14/01/2016	Meeting Room	This was not strictly the first time she had thought about this but we will attribute it as so, because she mentioned it here first								
3	5	Mabel	Discussion	14/01/2016	Meeting Room	Mentoring circles became a space where knowledge could be shared within the wider network							Collaboration site	
7	1	Group	Discussion	14/01/2016	Meeting Room	This was only important in so far as it changed the way we trained and coached locations				Promoting cultural awareness			Mentoring Circles	Mentoring Circles
7	2	Group	Discussion	14/01/2016	Meeting Room	Interesting comment from Mabel and a good pointer for me about her understanding of AR. In actual fact the discussions even where off topic proved a good picture of the organisational culture we are working with.								
3	6	Mabel	Discussion	14/01/2016	Meeting Room	Summarising in essence, observing what's been covered and setting the first action				Relevance of topics				
6	4	Effie	Discussion	14/01/2016	Meeting Room	On reflection, this first session tells a lot about the personalities in the group and also about what happens when people are free to talk about an issues that they did not think they could address previously.							Harvesting document	Group dynamics and personalities affect their approach to this topic and this study
		Effie	Reflection	14/01/2016	Home									
6	5	Effie	Discussion	11/02/2016	Meeting Room	This is important - did we jump to a solution too soon?				Jumping to a solution				
4	3	Rihanna	Discussion	11/02/2016	Meeting Room	Rihanna notes the lack of a proper system of transferring knowledge				Identifying the problem as one of transferring knowledge				

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