

# Knowledge Management at LifeTree Media

by

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# ABSTRACT

To survive in this age of globalization organizations need the capacity to retain, develop, systematize, and utilize their knowledge assets. The management of an organization's knowledge through the processes of creating, sustaining, applying, sharing and renewing that knowledge to enhance organizational performance and create value is known as knowledge management. This project report focuses on the process of creating a knowledge management tool at LifeTree Media, and discusses the significance of the concept vis à vis the creation of a learning organization. It also includes feedback on the system collected from a questionnaire, which was completed by the company president.

**KEYWORDS:** Information and Communication Technology (ICT) affordances model; learning management system; wiki; collaborative learning; knowledge management; Wikispaces; MediaWiki; task management; Trello; Asana; LifeTree Media; Publishing; project management; on-boarding; human resource management; human resource development; coaching; organizational learning; learning organization.

# DEDICATION

To my family: my mother, grandmother, and grandfather  
who have always believed in me.

To Jason Alliman and David Thomas  
for their support at a pivotal moment in my life.

To my Bookophilia and JMTC families  
for motivating and inspiring me.

Thank you.

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I would like to thank my family and friends who supported me along this journey.

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# 1. INTRODUCTION

## 1.1 The Postmodern Marketplace

*“Learning and knowledge management can be considered as two different viewpoints on the same stream of corporate processes.”*<sup>1</sup>

The postmodern marketplace is fast-paced; everything, from production and manufacturing to selling and consumption, changes at incredible speeds. This is evident in the emergence, decline, mergers and/or modifications seen in the publishing space. “Best practices” are rapidly and continuously being assessed and revised. The speed at which organizations are being forced to adapt and innovate has spurred the creation of “learning organizations,” capable of getting information from a volatile marketplace to develop relevant and timely solutions that address the next big “problem.” A company's key to success resides not so much in its workers and capital as in the capacity to treat knowledge.<sup>2</sup> Knowledge management is essential. The knowledge management perspective

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1. Clara Crocetti, “Corporate Learning: A Knowledge Management Perspective,” *The Internet and Higher Education* 4, no. 3 (2001): 272, [https://doi.org/10.1016/s1096-7516\(01\)00066-5](https://doi.org/10.1016/s1096-7516(01)00066-5).

2. Peter F. Drucker, *Post-Capitalist Society* (New York: Harper Business, 1993) quoted in Clara Crocetti, “Corporate Learning: A Knowledge Management Perspective,” *The Internet and Higher Education* 4, no. 3 (2001): 272, [https://doi.org/10.1016/s1096-7516\(01\)00066-5](https://doi.org/10.1016/s1096-7516(01)00066-5).



aims to manage tacit and explicit knowledge, so that all relevant information is available when it is needed and to those who need it.<sup>3</sup>

An effective knowledge management system facilitates organisational learning, which is pivotal to growth, innovation, and the effective execution of a company's strategy.<sup>4</sup> Knowledge management and organisational learning are not new points of focus for management research.<sup>5</sup> Indeed, scholars and professionals have acknowledged the importance of knowledge as one of the key factors for modern firms, and continue to highlight the value of knowledge as a strategic asset.

## **1.2 LifeTree Media & Knowledge Management**

This project report will examine the knowledge management efforts of LifeTree Media, an award-winning, boutique hybrid publishing company specializing in books and ebooks that help, heal, and inspire. The company was launched in 2013 by Maggie Langrick, and practices a system that blends “traditional” and author-directed publishing. They work with a select group of high-calibre author-clients whose work fits within their editorial mandate and meets their high standards for excellence.<sup>6</sup> The author covers the costs for concept development,

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3. Crocetti, “Corporate Learning,” 272, [https://doi.org/10.1016/s1096-7516\(01\)00066-5](https://doi.org/10.1016/s1096-7516(01)00066-5).

4. Bruce Strong, Thomas H. Davenport and Laurence Prusak, “Organizational Governance of Knowledge and Learning,” *Knowledge and Process Management* 15 no. 2 (2008): 150.

5. Steven Walczak, “Organisational Knowledge Management Structure,” *The Learning Organisation* 12, no. 4 (2008): 330-339.

6. “About LifeTree Media,” About Us, LifeTree Media, accessed June 1, 2017, <http://lifetreemedia.com/about-lifetree/>.

editing, design, and marketing. The team at LifeTree Media manage the project by developing the work to their standard, and facilitating distribution, sales and marketing of the books for a consignment fee. The author retains the rights to their work and receives the majority of the proceeds from sales.<sup>7</sup>

In 2016, the company had an in-house team of two employees (the publisher and the publishing coordinator), and a stable of more than 20 freelance editors and designers. They have seen rapid growth since inception and find themselves with a growing cohort of authors, freelancers, and awards. On average, they produce 4-6 titles per year in their key publishing categories of business, psychology, health, relationships, inspirational memoir, and personal development. Within their catalogue they have a getAbstract International Book Award winner, *Vaporized* by Robert Tercek; an Amazon.ca bestseller, *Growing Strong Girls* by Lindsay Sealey; a book ranked among the top 20 Parenting titles in Canada, *Discipline Without Damage* by Dr. Vanessa Lapointe; and books that have had their translation rights acquired by foreign publishers: *The Digital Matrix* by Venkat Venkatraman, *Vaporized* by Robert Tercek, and *Dai Manuel's Whole Life Fitness Manifesto* by Dai Manuel. Their team has also been recognized within the publishing space with Maggie Langrick being previously shortlisted for the Editors Canada Tom Fairley Award for Excellence in Editing for *Shell* by Michelle Stewart. In 2018, two of their titles earned silver Benjamin Franklin Awards from

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7. "What's Hybrid Publishing?" LifeTree Media, accessed May 13, 2018, <http://lifetreemedia.com/about-lifetree/getting-a-book-published-through-hybrid-publishing/>.

the Independent Book Publishers Association: *The Sacred Path of the Soulmate* by Gerald Sze, and *Growing Strong Girls* by Lindsay Sealey.

The challenge for the company is to replicate and expand on this success for other titles by managing the processes of acquisition, editing, marketing, distribution, rights sales, communication, and administration. To meet the challenge LifeTree Media will have to ensure the passage of their practices beyond the memory of the two-member core team of the publisher and publishing coordinator, their emails, and documents in Google Drive and DropBox.

In order to better scale their growth, I used an existing tool to design a knowledge management system to organize and share knowledge on:

1. book production, author platform development, distribution, brand marketing etc.;
2. onboarding, and the continuous training and coaching of authors, freelancers, and internal staff members;
3. archiving and building the company's institutional memory;
4. knowledge sharing with an aim to cultivate a learning organization.

This would help the publishing coordinator better plan, track, and control projects, and help the publisher more readily assess whether or not practices are aligned with the company's vision and mission. What was tacit knowledge, held by individual team members, would now become widely available, thus increasing the organization's knowledge base.

To start, Maggie asked me to examine another publishing company's internal wiki to glean insight into what information was useful to store, and to have a starting point as it related to taxonomy. Then I researched wikis generally, and potential platforms, with the needs of the company in mind. The LifeTree Media system was designed using WikiSpaces.

The report will progress as follows:

In **chapter 1**, a discussion on the postmodern marketplace, and the challenges of scaling a small company to be competitive with reference to LifeTree Media.

In **chapter 2**, a literature review on knowledge management (KM), defining and outlining the types of knowledge, as well as examining some of the benefits of a system.

In **chapter 3**, a discussion on wikis, the strategic significance of developing and implementing a knowledge management system, and moving the company towards the learning organization model. I look at considerations behind selecting the software—Wikispaces;

In **chapter 4**, a look at the stages of the knowledge management cycle with emphasis on capturing, coding, and publishing information—the setup of the system.

In **chapter 5**, feedback on the short-term impact of the system, looking at the benefits and challenges. This information was collected through a questionnaire completed by the company's president and publisher, Maggie Langrick. See Appendix B for the responses. In this section I will also discuss possible opportunities to support the initial wiki system.

In **chapter 6**, I give a brief conclusion to the report.

### **1.3 The Goal**

A 2014 case study entitled “Communities of practice: linking knowledge management and strategy in creative firms,” found that having an appropriately balanced strategy of personalisation and codified knowledge through communities of practice contributed to the competitiveness of firms.<sup>8</sup> At LifeTree Media the main goal was to create a space that author-clients, freelancers, and staff could learn from, and contribute to growing the knowledge of the company. This sharing and growing of knowledge would include personal methods of work and industry-wide best practices. The environment being created was projected to improve efficiencies, and thereby increase the number of clients that could be engaged in a season. A secondary goal of the project was to give the core team at the company an opportunity to audit their existing knowledge assets and knowledge flows.

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8. “Knowledge Management and Business Strategy,” *Strategic Direction* 31, no. 9 (2015): 26, <https://doi.org/10.1108/sd-07-2015-0098>.

## **1.4 Feedback**

As mentioned earlier, feedback was solicited from the president and publisher, Maggie Langirck. This was done by way of a questionnaire. The questions were designed to capture input on the benefits and shortcomings of the system. I also followed up via telephone to get a fuller understanding of the responses as presented in Appendix B. The report offers a brief discussion of recommendations to address some of the concerns raised via the questionnaire and telephone follow-up.

## 2. THE KNOWLEDGE ECONOMY

“The industrial machine was about hierarchies, big companies, big unions, big cities, big government. The thrust of this new economy...gives power to individuals. It gives power to people.”<sup>9</sup>

The idea that knowledge plays a major role in the economy is not novel. Whether the economy is agricultural or industrial, the knowledge of how tasks are done has had to be collected and shared.<sup>10</sup> This new economy, with its shrinking computers and expanding communication capabilities, has three distinguishing characteristics: (i) globalism, (ii) the prioritization of intangibles, such as ideas, information, and relationships, and (iii) interconnectivity. The effect is the creation of a new marketplace and society rooted in ubiquitous electronic networks. Though networks have existed in many forms, in varying types of economies, the level of penetration afforded by modern technology is unprecedented.<sup>11</sup> Knowledge management embodies the aforementioned characteristics: it is not tied to a geographical space, deals in the business of intangibles, and is meant to be shared.

Information and communication architecture, defined by social structures, cultural contexts and other factors that influence human behaviour, are necessary for knowledge flows. In the era of the knowledge economy, it is also true that the main resource is not

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9. John Heilemann, “It’s the New Economy, Stupid,” *Wired* 4, no. 3 (1996): 67.

10. Sanjay Mohapatra, Arjun Agrawal and Anurag Satpathy, *Designing Knowledge Management-Enabled Business Strategies: A Top-Down Approach* (Switzerland: Springer, 2016): 2.

11. Kevin Kelly, *New Rules for the New Economy: Radical Strategies for a Connected World* (New York: Penguin, 1998): 1-2.

depleted by use, as was seen in the pre-knowledge dominated economy, but actually grows through application and refinement. In the knowledge economy, value depends heavily on time of usage, content, and context. Thus, the same information or knowledge can have vastly different values to different people or even to the same person at different times. In the traditional economy, this variation is not seen.

Organizations can no longer deny the importance of developing systems that enable them to tap into the reservoir of knowledge of employees, as human capital competencies are key elements of value in a knowledge-based company. Of late, these capitals are reported in annual reports in many “learning organisations.”<sup>12</sup>

Publishing has long since operated in the knowledge economy, however, within the previous decade alone we have seen the introduction of technologies such as Facebook, Instagram and the like that have made sharing, creating, and curating knowledge all the more competitive. With that said, publishers large and small are faced with the challenge of training and coaching staff to meet the demands of a volatile and fast-paced information economy. The human element is still essential—but staff increasingly have less and less time to “train,” in the traditional sense; so what can be done to ensure that corporate knowledge is easily transmitted and readily available, when necessary? We are so used to searches, comments, and sharing—our learning tools must embrace and reflect this, and they have.

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12. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 2.



## 2.1 On Knowledge and Knowledge Management

According to Mohapatra et al (2016) knowledge exists in two forms in organizations: tacit and explicit. Tacit knowledge resides in the minds of individuals, while explicit knowledge is available in recorded formats.

**Table 1.1** Tacit vs. Explicit Knowledge<sup>13</sup>

Tacit	Explicit
Difficult to reproduce as the knowledge resides in an individual's mind and is context specific;	Easy to diffuse, transmit, reproduce without ambiguity and share with others;
Abstract in nature and cannot be used for training because of lack of standardization;	Can be used for training and enhancing skills as they are available in concrete forms;
Cannot be made available all the time;	The knowledge is categorised, coded, and is easily available when there is a need;
Cannot be the base for training;	Can be used for preparing user manuals and induction training for new staff;
Can only be used for new and exceptional cases;	The knowledge is standardised and is mainly used for regular standard processes;
The knowledge transfer is good only for face-to-face discussion and knowledge transfer	The knowledge transfer is good for groups and the organisation as a whole

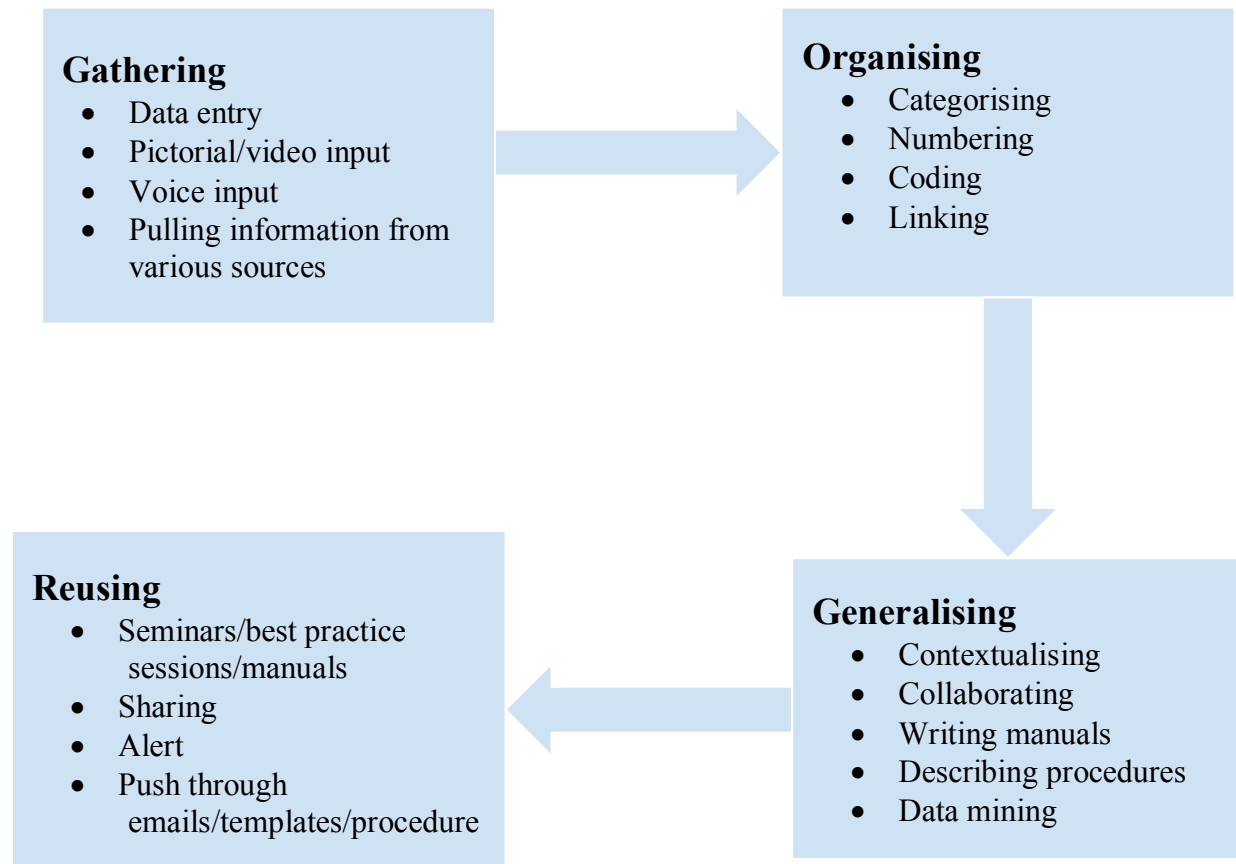
In most organisations knowledge exists in the tacit form and remains untapped and prone to loss due to employee turnover, retirement or recruitment by competitors. The focus of knowledge management is to bring tacit knowledge to an explicit form and

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13. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 7.

then define methods by which it will be applied to organisational processes/challenges.

Figure 1.1 below depicts the four main stages of knowledge management.



**Figure 1.1** Four major stages in knowledge management<sup>14</sup>

Success in the knowledge economy is defined by the ability to create, store and share knowledge, as these factors directly impact a company's competitive advantage. Unlike other commodities, knowledge has the ability to multiply with use, such as in instances when team members bring their own experiences and research to bear on information being transmitted. Conversely, this can also make it difficult to manage and re-use knowledge assets, as they are sometimes too personalized. The danger of knowledge being kept exclusively in tacit form is made most apparent when employees

14. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 7.

leave an organization without documenting or sharing task knowledge, or institutional knowledge garnered over time, such as insights gained from working with other stakeholders, internal and external to the organization.<sup>15</sup>

It is suggested that the learning organization is established upon five principles. In *The Fifth Discipline*, Peter Senge outlines them as follows: systems thinking, personal mastery, the mental model, shared vision, and team learning.<sup>16</sup> The discipline of “systems thinking” sees organizations as a whole. It demands that the organization be seen as a system rather than a single unit or individuals or staff members. Within learning organizations, staff are encouraged to strive towards “personal mastery,” characterised by continuous self-improvement. Further, the “mental model” discipline implores staff to adjust their mindset to work within the structure of the system. This system is kept alive by encouraging staff members to share their views for the future of the organization, that is, developing a “shared vision.” This staff interaction generates new ideas and improvements, which is considered “team learning.”<sup>17</sup>

Knowledge management has to be systemic and based on scientific processes, so that there is no major disruption in the creation, assimilation, or diffusion of knowledge within the organization. The systemic approach leads to the storage of valuable lessons and best practices learned from day-to-day operations; and though the aim is to create a readily replicable set of steps, it does not replace the importance of individual knowledge, but serves to strengthen the pool of knowledge that exists within the

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15. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 3.

16. Peter Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization* (New York: Doubleday, 1990): 16

17. Senge, *Fifth Discipline*, 16.

organisation. This strengthening is achieved through coding and storing the knowledge in a logical, company specific form, so that many more in the organization can assimilate it into their work.<sup>18</sup>

## **2.2 Benefits of Knowledge Management**

If a company is able to extract, organize, share, and preserve knowledge embedded in organizational processes it should be able to (1) enrich the organizational knowledge bases in a systematic and controlled way, (2) support employees to be better able to acquire their job role-specific knowledge, and (3) help govern and plan human capital investment.<sup>19</sup> This sharing of knowledge can lead to a higher problem-solving ability, a reduction of risks within decision-making processes, and overall higher satisfaction among employees. As the employees move consciously, and in unison towards the organization's goals, they are able to more deeply connect and contribute to the development of the company.

A measure of success for the knowledge worker is how fast they can learn, acquire and share knowledge among themselves and then apply that knowledge to the organization to sustain growth. A measure of a Knowledge Management (KM) system is how well it facilitates this process. The questionnaire and follow-up interview used to assess the work at LifeTree Media were administered with this tenet as a guide to measure the company's achievements.

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18. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 3.

19. András Gábor and Andrea Kö. eds. *Corporate Knowledge Discovery and Organizational Learning: The Role, Importance, and Application of Semantic Business Process Management* (New York: Springer, 2016): vi.

## 3. PROJECT OVERVIEW

### 3.1 Framework

As stated earlier, a major aim of the project was to codify and store the existing “task knowledge” of the organization. Task knowledge refers to the steps employees are expected to execute within processes.<sup>20</sup> In order to do this, we had to first assess the existing knowledge, strategies for extraction, documentation, sharing, and revision. In the LifeTree Media context, many company practices had never been streamlined, recorded, or disseminated. This presented a dynamic challenge, as the information, in many instances, was not well-documented or had never been documented. As one can imagine, it can be difficult to design an interconnected system, if the content is in varying states of completeness. As is the case in many organizations, the employees at LifeTree Media knew what they did, but were not necessarily able to communicate this information readily to train an individual new to the process. This needed to change to encourage sustainable growth. So, we embarked on creating a systematic, reliable and replicable system of documentation, sharing, and learning. As an interconnected system the tool would highlight the flows of communication and interactions between team members within a defined process, so as to allow those external to that process a way to understand the language, timelines, possible complicating factors and available remedies that may have an incidental or direct impact on their own work. This would be the primary advantage of the system—its potential to aid learning across the

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20. Gábor and Kő, *Corporate Knowledge*, 3.

organization, which could lead to better planning, and management of resources. It is important for members of any small workforce to be able to understand the tasks of colleagues, so as to adapt their own timelines, or give meaningful input at pivotal junctures.

Maggie Langrick, through her connections with Greystone Books, was able to gain access to their internal wiki system for the purposes of learning and modelling the LifeTree Media Knowledge Management system. The internal success and design of the Greystone wiki inspired our project.

Greystone Books is a trade book publisher that focuses on high-quality non-fiction books that appeal to regional, national, and international readers.<sup>21</sup> Incidentally, the Greystone wiki is based on an editorial handbook created by a MPub alumnus, Iva Cheung, during an internship at their previous parent company, Douglas & McIntyre Publishing Group, in 2005. The Douglas & McIntyre editorial handbook was created as a tool to communicate expectations, timelines, and processes with an aim to improve author-publishing staff communication and ultimately strengthen the underlying professional relationship. As Cheung (2005) puts it, publishing staff “often bear the burden of clearing up their authors’ ignorance and misconceptions, which can be a time-consuming endeavour.”<sup>22</sup>

It was important for the company to shift explanations to and solicitations for feedback from staff and clients away from email and DropBox. It was thought that this would help

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21. “Main page,” Greystone, accessed June 2017, [http://wiki.greystonebooks.com/index.php?title=Main\\_Page](http://wiki.greystonebooks.com/index.php?title=Main_Page).

22. Iva Cheung, “The Editorial Handbook: A Comprehensive Document to Guide Authors Through The Editorial Process at Douglas and McIntyre Publishing Group” (MPub report, Simon Fraser University, 2015): 1.

with organization, efficiency, and the overall image of the company. This idea is supported by a 2016 survey report from The Chartered Global Management Accountant organization entitled, “Joining the Dots: Decision Making for a New Era,” which presented results from 300 executives at large organisations from 16 countries. It found that many businesses were struggling to turn the deluge of data available to them into strategic insight. The researchers reported that companies that actively considered the relationship between various operating and functional units, as well as resources and relationships they use or affect, had the most effective decision-making practices. The authors call this approach “integrated thinking.” The feedback from the CEOs suggested that the integrated thinking approach leads to more “joined-up decision-making and actions that consider the creation of value over the short, medium, and long terms.”<sup>23</sup>

The LifeTree Media Knowledge Management System was an attempt to bring the “integrated thinking” approach to the company, and the wiki was the tool of choice. Maxwell (2007) suggests that a wiki takes the approach of scaffolding, “a ‘simplest possible’ software system, one which poses almost no restrictions on its users whatever, then [allows one to] strategically add small doses of structure and constraint as required by actual practice.”<sup>24</sup> The nature of the wiki suits projects that need real-time updates, and collaboration across organizational functions, (definitely) representative of “joined-up decision making.”

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23. “Joining the Dots: Decision Making for a New Era,” *Chartered Institute of Management Accountants* (February 2016): 11, accessed January 10, 2017, <https://www.cgma.org/content/dam/cgma/resources/downloadabledocuments/joining-the-dots-report.pdf>.

24. John W. Maxwell, “Using Wiki as a Multi-Mode Publishing Platform,” *Proceedings of the 25th Annual ACM International Conference on Design of Communication–SIGDOC 07* (October 22, 2007): 196, <https://doi.org/10.1145/1297144.1297185>.

## 3.2 Wiki

What exactly is a wiki? A “wiki” is an application of Web 2.0 tools, which allows users to collaborate when working in project environments.<sup>25</sup> The simplicity of wiki editing allows for greater accessibility, not requiring users to have extensive technical skills. I had a limited amount of time to acquire technical skills, and so too would users of whatever system we created, so the accessibility of a wiki was very attractive. Maxwell and Felczak in their paper *Success through Simplicity: On Developmental Writing and Communities of Inquiry* (2008) praise the wiki for its “zen-like aesthetic,” and note that though it was primarily aimed at software developers, it has the potential to be used by educators.<sup>26</sup> Over the years wiki usage in the corporate space has increased. But though significant research has been done on wiki-based consumer websites such as Wikipedia and other wiki-based public sites, the research on wikis in the organisation leaves much to be desired.<sup>27</sup> This project made use of Wikispaces, a wiki platform designed with educators and their classrooms’ needs in mind.

Wikis by their very nature are systems that manage knowledge. A two-phase research project entitled *Corporate Wiki Users: Results of a Survey* by Majchrzak, Wagner, and Yates in 2006 identified some of the most popular work activities the technology aids.

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25. Zeeshan Ahmed Bhatti, Serge Baile and Hina Mahboob Yasin, “The Success of Corporate Wiki Systems,” *Proceedings of the 7th International Symposium on Wikis and Open Collaboration–WikiSym 11* (2011): 134, <https://doi.org/10.1145/2038558.2038581>.

26. John Maxwell and Michael Felezak, “Success through Simplicity: On Developmental Writing and Communities of Inquiry,” in *Wiki Writing: Collaborative Learning in the College Classroom*, ed. Robert E. Cummings and Matt Barton (Ann Arbor: Digital Culture Books, an Imprint of the University of Michigan Press and the University of Michigan Library, 2008): 90, [https://quod.lib.umich.edu/d/dcbooks/5871848.0001.001/--wiki-writing-collaborative-learning-in-the-college-classroom?g=dculture:trgt=pb\\_91:view=fulltext:xc=1](https://quod.lib.umich.edu/d/dcbooks/5871848.0001.001/--wiki-writing-collaborative-learning-in-the-college-classroom?g=dculture:trgt=pb_91:view=fulltext:xc=1).

27. Bhatti, Baile and Yasin, “Success of Corporate Wiki,” 135, <https://doi.org/10.1145/2038558.2038581>.



These include:

- **Software development** (including technical documentation, client approval, issues tracking, internal workflow, quality & process management, software design, reference information, setup information, configurations, specifications etc.);
- **E-learning;**
- **Project management;**
- **Posting of general information and knowledge management** (including vacation schedules, how-tos, best practices, policies and procedures etc.);
- **Communities of practice and user groups;**
- **Ad-hoc collaboration** (including hashing out ideas, remote collaboration, business brainstorming);
- **Tech support;**
- **Marketing and customer relationship management** (including tracking interesting marketing trends, collecting data, logging daily lead counts, information on partnerships, notifying users of new features, marketing materials, with some opening up their wikis to selected customers);
- **Resource management;**
- **Research and Development (R&D)** (including product requirements, product information, and commercialization with one source reporting that “almost everything relating to R&D is tracked through the wiki”).<sup>28</sup>

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28. Ann Majchrzak, Christian Wagner, and Dave Yates, “Corporate Wiki Users: Results of a Survey,” *Proceedings of the 2006 International Symposium on Wikis–WikiSym 06* (August 21, 2006): 100, <https://doi.org/10.1145/1149453.1149472>.

Poole and Grudin (2010) suggest that there are three (3) types of wikis used in a business setting. They include the *single contributor wiki*, which as the name suggests is used by an individual to manage their own work. The *group, team or project wiki*, the most popular of the three, is used for project documentation and communication among team members; and the *inter-use encyclopedia* is used to store companywide information.<sup>29</sup>

We were very interested in exploring the possibilities a wiki could offer LifeTree Media as it related to storing and sharing the gathered information. The ideas for the system gradually took shape after a series of meetings held with the president and production coordinator. The team at LifeTree Media was tremendously supportive, as they gave me access to the Google Drive, DropBox and any other space where organizational information might be stored, right from the start. As mentioned earlier, email and/or Cloud-sharing software, such as Google Drive or Dropbox, have their limitations when it comes to training staff. Though they are still very much relevant and pivotal to the success of a business, neither allows for the real-time development of a company's knowledge. Though you may be able to find the procedure to complete a task, the information may lack insights on the impacts the process has on any countless number of tasks being carried out by staff in different departments, for example. These software may be able to store information, but lack the functionalities needed to capture the knowledge of employees in a way that it can be readily used for training.

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29. Erika Shehan Poole and Jonathan Grudin, "A Taxonomy of Wiki Genres in Enterprise Settings," *Proceedings of the 6th International Symposium on Wikis and Open Collaboration–WikiSym 10* (July 7, 2010): section 1, <https://doi.org/10.1145/1832772.1832792>.

The system at LifeTree Media was designed with three distinct groups in mind. They are internal employees, authors/clients, and freelancers. The information needed by these groups was scattered among many sources; the primary one being email. Though email platforms store information, the design is not meant to onboard or provide continuous training for staff. Majchrzak et al (2006) describe a situation in which a lag exists between creating and sharing knowledge in the organization; it is also suggested that obsolete and inaccurate information is likely to dominate the knowledge base of firms.<sup>30</sup> At LifeTree Media, it was difficult to decide what were the final, agreed-upon steps in a process when the full step-by-step breakdown of tasks, or parts thereof, was scattered among email with varying subject titles, and transmitted over protracted periods. The introduction of a wiki aimed to fix this situation, allowing for more efficient and effective use of information from all parties, including staff, freelancers, and clients. It has been proven that the participatory nature of wikis can generate huge amounts of information from the users and can create a feeling of community, empowerment, and ownership.<sup>31</sup> It was hoped that the system would become self-curating, limiting the amount of administration on the part of production coordinator.

As mentioned earlier, the project aimed to move LifeTree Media towards becoming a learning organization, in which those engaged with the processes and functions of the organization would have opportunity to give meaningful input into how tasks are carried out. Substituting the language of the organization for the language of the classroom found in Maxwell and Felczak (2008), “to truly empower [workers]...the [leader’s] role

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30. Majchrzak, Wagner and Yates, “Corporate Wiki Users,” 100, <https://doi.org/10.1145/1149453.1149472>.

31. Bhatti, Baile and Yasin, “Success of Corporate Wiki,” Section 1, <https://doi.org/10.1145/2038558.2038581>.

shifts to that of establishing context or setting up problems. In a wiki, the [leader] may set the stage or initiate interactions, but the medium works most effectively when [workers] can assert meaningful autonomy over the processes.”<sup>32</sup> What better way to incentivize acquisition and revision of knowledge within the organisation than to have employees participate in the creation and updating of that information? The information would not be far removed from the actual process—users would carry out processes based on checklists, and would have opportunity to flag changes, obsolescence, or disuse, and so trigger updates in the system.

In order to choose the most appropriate solution for LifeTree Media, I briefly examined a number of different wiki environments. These included Mediawiki, Dokuwiki, and Ziwiki. I also read up on document management systems (DMSs) and content management systems (CMSs). After this research and a brief presentation to the team during a morning meeting, it was decided that I would not invest time into learning the wiki markup (wikitext) formatting used on platforms such as Wikipedia and other such websites. Instead the research guided me towards environments which included WYSIWYG editors/toolbars, and those with the ability to handle embedded media. WYSIWYG stands for “What You See Is What You Get,” and allows “a user to display a document on a computer monitor in exactly the form the document will take when

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32. Brian Lamb, “Wide Open Spaces: Wikis, Ready or Not,” *Educause Review* (September–October 2004): 37–48, <http://connect.educause.edu/Library/EDUCAUSE+Review/WideOpenSpacesWikisReadyo/40498>, quoted in John Maxwell and Michael Felezak, “Success through Simplicity: On Developmental Writing and Communities of Inquiry,” in *Wiki Writing: Collaborative Learning in the College Classroom*, ed. Robert E. Cummings and Matt Barton (Ann Arbor: Digital Culture Books, an Imprint of the University of Michigan Press and the University of Michigan Library, 2008): 91, [https://quod.lib.umich.edu/d/dcbooks/5871848.0001.001/--wiki-writing-collaborative-learning-in-the-college-classroom?g=dculture:trgt=pb\\_91:view=fulltext:xc=1](https://quod.lib.umich.edu/d/dcbooks/5871848.0001.001/--wiki-writing-collaborative-learning-in-the-college-classroom?g=dculture:trgt=pb_91:view=fulltext:xc=1).

printed. It is essential for the accurate reproduction of images, type displays, and other graphic elements.”<sup>33</sup>

We decided that the project would be done with WikiSpaces, which was a good match for what we wanted to execute, and even came with customer service support.

### ***Wikispaces***

Wikispaces is a social writing platform for education. The platform was founded in 2005 by TES Global, a digital education company that has been supporting educators for over 100 years. Their mission is to help teachers, schools and universities develop and deliver the best education. The company is becoming a popular option or alternative because of its user-friendly design. They now have over 10 million registered users.<sup>34</sup>

Wikispaces is primarily used by schools, but offers a corporate account option. They were willing to negotiate on the associated charges for this type of account when we explained the size of the company, the nature of the business being conducted, and use of the wiki as a knowledge management system. WikiSpaces offers annual packages within three tiers—Plus (2Gb), Super (5Gb), and Private Label (100 users) at \$100, \$400, and \$2000, respectively. The 2Gb plan would not have been enough for our project, so we considered the 5Gb plan to start. In the end WikiSpaces gave us access to their Private Label plan.

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33. Stanley Klatsky, “WYSIWYG,” *Aesthetic Surgery Journal* 23, no. 4 (July 1 2003): 274, [https://doi-org.proxy.lib.sfu.ca/10.1016/S1090-820X\(03\)00150-X](https://doi-org.proxy.lib.sfu.ca/10.1016/S1090-820X(03)00150-X)

34. “About,” Wikispaces, accessed May 13, 2018, <https://www.wikispaces.com/about>.

Wikispaces would provide the following:

1. **Built-in learning tools** by way of an education portal that offers tutorials on the setup and maintenance of the WikiSpaces environment.
2. **Customer service assistance** to help fix technical issues. These could be handled by the team at Wikispaces or via troubleshooting FAQs and tutorials found on their built-in education portal.

Though the WYSIWYG editor of WikiSpaces is what Maxwell (2007) would characterize as an evolution away from the “virtue of simplicity” promised by wikis,<sup>35</sup> this feature made it very easy to create assignments, share resources, make announcements, and foster discussions and community, all of which are important for the team at LifeTree Media. The platform was also used to create discrete user spaces for specific roles or tasks within the company, which made it easy to keep the work of staff, freelancers and authors/clients separate and easily managed. Each group had access to one or more areas depending on their level of clearance; for example, internal staff would be able to access the freelancer and author spaces, while the freelancers and authors would have access only to their respective areas, so as not overload either group with too much information.

The following chapters will discuss the process of designing the system, and present an evaluation of the effort from the company.

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35. Maxwell, *Using Wiki*, 198, <https://doi.org/10.1145/1297144.1297185>.

## 4. DEVELOPING THE LIFETREE MEDIA WIKI

### 4.1 Stages in the Knowledge Management Cycle

According to Agrawal et al (2016), these are the six stages within the knowledge management cycle:

1. Capturing;
2. Coding;
3. Publishing;
4. Sharing;
5. Accessing;
6. Application<sup>36</sup>

Each is discussed in relation to the creation of the system at LifeTree Media. I will start with point 4 from the list, as it underscores the purpose of the project.

#### 4.1.1 Sharing (with staff, freelancers, and clients)

The purpose of capturing and codifying the organization's processes is inevitably to share this knowledge with stakeholders (staff, freelancers, and clients). Some tools for sharing include groupware—devices connected physically by a local area network (LAN); wikis, which have already been discussed and are the basis of the system at LifeTree Media; as well as other networking technologies, such as intranets, extranets or web-based shared workspaces. Agrawal et al (2016) encourage businesses to consider

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36. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 15.

customer feedback and, in our case, user feedback, as this may further contribute to the solution-oriented environment facilitated by a knowledge management system.<sup>37</sup> This feedback or further capturing of information may influence updates or future design, as ultimately the organization strives to meet the needs of clients as effectively and efficiently as possible. This way of thinking and design of a system keeps lines of communication open, and allows the company to be aware of issues or opportunities.

#### **4.1.2 Capturing**

“Knowledge capturing refers to the identification and subsequent codification of existing internal knowledge and know-how within the organisation and external knowledge from the environment.”<sup>38</sup>

The Greystone wiki was our first point of departure for this project. I assessed the categories of information stored, the way in which categories/subjects were linked, and the general organization of the wiki. I was also given access to LifeTree Media’s DropBox and Google Drive, from which to-do lists and best practice documents were extracted or created, and made ready for the coding process. In addition to this, all members of the permanent team, Maggie and Paris, were encouraged to search their email for explanations and instructions to freelance staff and clients, across all company functions, including editorial, marketing, design, distribution etc. and forward that information for review and coding. Maggie was also keen to use this opportunity to

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37. Ibid., 17.

38. Ibid., 15.



document procedures for tasks that previously had no guide. There was also a call to research existing publishing house best practices via web searches to add this information to the wiki.

The collected information was stored, edited, and monitored using Google services—Google Docs and Google Spreadsheets. All information mined from either an existing repository, emails, web searches, or knowledge conversion from tacit to explicit, were logged and assigned to the relevant team member for edits and final review.

### **4.1.3 Coding**

The existing knowledge at LifeTree Media needed to be converted to a state that made it readily understandable and accessible by multiple audiences. This process took the form of creating pages within the Wiki environment. An example of why this is important came early on in my time with the company. A distributor based in India contacted LifeTree Media to order books, but at that time an international order had never been filled directly. However, the knowledge on how to do this existed, albeit in a tacit form. Filling this order gave occasion to explicitly document the process.

Knowledge can be codified in many ways. Some popular methods include knowledge taxonomies, cognitive maps, and decision trees.<sup>39</sup> The knowledge taxonomy is the method that most directly mirrors what took place during the project. A taxonomy is a structured set of names and descriptions used to organize information and document it

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39. Ibid., 16.

in a consistent way.<sup>40</sup> The origin of the word is in the Greek *taxis*, which means “order” and “arrangement.”<sup>41</sup> Whittaker and Breininger (2008) define a taxonomy as a controlled vocabulary, in which each term usually has hierarchical relationships, which means that a taxonomy imposes a topical structure on information. It uses a logical arrangement and does not usually account for users’ specific decision-making and action-taking needs.<sup>42</sup> The Greystone taxonomy was the main inspiration for the categories to be adopted within the LifeTree Media Knowledge Management System. Examples of the Greystone wiki taxonomy can be found in figures 2.1. and 2.2. on the following page.

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40. Patrick Lambe, *Organizing Knowledge: Taxonomies, Knowledge and Organization Effectiveness* (Witney: Elsevier Science & Technology, 2007): 5, ProQuest Ebook Central, <https://ebookcentral-proquest-com.proxy.lib.sfu.ca/lib/sfu-ebooks/detail.action?docID=1639661>.

41. Lambe, *Organizing Knowledge*, 4.

42. Mary Whittaker and Kathryn Breininger, “Taxonomy Development for Knowledge Management,” *World Library and Information Congress (74th IFLA General Conference and Council , Quebec, Canada, 13 August 2008)*: 2, [http://archive.ifla.org/IV/ifla74/papers/138-Whittaker\\_Breininger-en.pdf](http://archive.ifla.org/IV/ifla74/papers/138-Whittaker_Breininger-en.pdf)

## Main Page

### Welcome to the Greystone Books Editorial Wiki

This site aims to provide all in-house and freelance editors with the latest templates and editorial guidelines.

<b>General editorial resources</b> <ul style="list-style-type: none"><li>• Overview of workflow at Greystone Books</li><li>• News and events</li><li>• Freelance FAQ</li></ul>	<b>Resources by genre</b> <ul style="list-style-type: none"><li>• Art books and other illustrated books</li><li>• Cookbooks</li><li>• Guidebooks</li><li>• Anthologies</li><li>• Translations</li><li>• Fiction</li><li>• New editions of previously published books</li><li>• Co-published titles</li><li>• Rights acquisitions/buy-ins</li><li>• Straight reprints</li><li>• New format reprints</li><li>• Catalogues</li></ul>
<b>Resources by role</b> <ul style="list-style-type: none"><li>• Editorial resources for substantive editors</li><li>• Editorial resources for copy editors</li><li>• Editorial resources for proofreaders</li><li>• Editorial resources for indexers</li></ul>	<b>In-house resources</b> <ul style="list-style-type: none"><li>• Templates, forms, and checklists for in-house use only</li><li>• Production schedule initials</li></ul>
<b>Resources by document type</b> <ul style="list-style-type: none"><li>• Overview of roles and responsibilities</li><li>• Editorial guidelines</li><li>• Templates, forms, and checklists</li><li>• Other documents</li></ul>	

Figure 2.1. Main page, Greystone wiki (“Main page,” Greystone, 2014)

## Editorial resources for substantive editors

Below are basic editorial resources that substantive editors will need. If you are working on a particular type of book, consult also the [genre-specific editorial resources](#).

<b>Contents</b> <a href="#">[hide]</a>
1 Roles and responsibilities
2 Guidelines
3 Templates, forms, and checklists
4 Other documents

### Roles and responsibilities

- Roles and responsibilities of substantive editors

### Guidelines

- Editing guidelines
- Acumen and Advance Book Information sheets (ABIs)
- Estimating page counts for text-only books
- Concept meeting checklist
- Scheduling of the editorial, design, and production process
- Style sheet guidelines
- Mark-up and inputting guidelines for typed material
- Half-title and title page components
- Paper line guidelines
- Jacket and cover copy
- Indexing guidelines for general non-fiction
- Editing indexes
- Author photo guidelines
- Archiving guidelines

Figure 2.2. Editorial resources for substantive editors (abridged) (“Editorial resources for substantive editors,” Greystone, 2014)

The Greystone wiki's main audience is their internal staff. The LifeTree project was to take into consideration the three audiences of the company—internal staff, freelancers, and authors/clients. These lists can be found in Appendix A. Though we followed the Greystone model, we had to make two very deliberate alterations—1. discrete groups/portals had to be created for each category of user, and 2. the information found in each area had to be designed with the respective user group in mind. For example, in the freelancer section under editorial tasks there is a page that speaks to scheduling of the editorial, design, and production process, which provides instructions on when and how to make contact with different stakeholders, the corresponding pages in the author environment lay out instructions on what to do at each milestone, that is, how to respond, the appropriate file types to use, expected timeframes in which to respond, and possible impacts delays may cause. The idea was to have the system tailored for each user group, i.e., answering the questions most relevant to them. In Section 5.2.2 I address some of the shortcomings.

#### **4.1.4 Publishing (for staff, freelancers, and clients)**

Knowledge is only useful if it is delivered to the party who needs it, in a timely manner, in a format and through a medium that they are able to access. Knowledge publishing is defined as the process that allows getting knowledge to those people who need it in a form that they can use it.<sup>43</sup> Different users may require the same knowledge presented in a different way.

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43. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 16.

The LifeTree Media knowledge management system provides users information about tasks that they will have to execute, or those that impact their own work processes. This information is delivered through their respective sections, and formatted with their needs and technical knowledge in mind. When designing the pages of the wiki we also thought about the best formats for delivery—e.g., checklists or paragraph. To deepen the engagement with the information, we added a linked table of contents, which brings a user to a topic/task of their choice. We also used the functionality of the wiki to link and anchor pages, to make navigation more seamless; users need not go back to the table of contents to move from one page to the next. Due to the interconnected nature of the wiki's design, they are able to understand how all aspects of the publishing process at LifeTree are connected or focus only on those areas relevant to them or their particular task on that occasion.

#### **4.1.5 Accessing and Application**

The shelf life of knowledge is fairly limited, therefore the knowledge management system must readily provide the most up-to-date, relevant information; frequent application ensures that the existing knowledge is refined or revised. This refinement or revision can be done by individual users in conjunction with a system administrator to ensure that others who use the tool and their own tasks are considered before an update is made. This application moves to further entrench a culture of sharing and learning within the organization.

There are many possible configurations of steps towards the completion of tasks, but the company needs to assert which are the best options for its particular

circumstance/operations. Maxwell (2007) suggests that the ideal situation in the publishing context is that the work of organizing and managing the content in the wiki system remains an *editorial process*, rather than a technical administration task. “This ideal puts the emphasis on *conviviality*, rather than alternative virtues of completeness or even correctness.” Maxwell (2007) also reinforces that wikis must be livable space—“tools that we can live with.”<sup>44</sup> Users are made a part of the decision making process, or at the very least have a better understanding of why task completion is organized in a particular way. For example, an author should be more readily able to appreciate how their delays may affect their publication date or the marketing efforts around their project.

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44. Maxwell, *Using Wiki* , 199, <https://doi.org/10.1145/1297144.1297185>.

## 5. FEEDBACK ON THE WIKI & SUGGESTIONS

### 5.1 Introduction

In the summer of 2017, a questionnaire was sent to Maggie Langrick to assess the knowledge management system at LifeTree Media from inception to its current state. I wanted the president to complete the questionnaire, so as to evaluate the system's potential and results vis à vis the company's strategy. The subsequent paragraphs will reference responses to the questionnaire.

As stated earlier, the main goal of implementing a knowledge management system at LifeTree Media was to move them closer to becoming a learning organization by documenting and systematizing the processes of the company, and making this information readily available to staff, freelancers and clients (authors). The implementation costs were minimal, as the wiki platform had a manageable learning curve that did not require a large investment of time, and provided tutorials and customer service assistance, when necessary. In 2017, the system took about 1-2 hours per week of the president's and production coordinator's time to manage. The main tasks being documenting or sourcing information to develop the pages for the three (3) discrete sections of the wiki. Initially, the staff thought that it would be beneficial to have authors and freelancers interface with the system. However, as the wiki grew they decided that it would be impractical to do so, as they assumed that it would not be easily navigable to persons who rarely use it. The solution devised by the team was to develop a Word document operations manual with links throughout and

linked table of contents. The idea here was to utilize a familiar environment for authors and freelancers with a more linear setup to diminish the learning curve of those groups. This shift would also decrease the amount of time staff would need to manage the manual; they would not need to update tailored pages across the wiki platform. The company would lose the classroom-style environment where people could share their insights more readily, but would have less resistance to the system's novelty. If in the future LifeTree Media wishes to return to the wiki, I would strongly recommend the development of an implementation strategy that takes into consideration the reservations some users may have by asking them to provide solutions on how to make it more accessible.

It should be noted that even with the shift to the Word document operations manual, when asked how well the wiki responded to the needs of the company, the president scored it 8/10; as it was the wiki that enabled LifeTree Media to compile all of their procedural instructions. According to Maggie, it was a worthwhile endeavour.

## **5.2 Findings**

This section of the report will highlight findings from the interview, showing the benefits and challenges. It will also provide a discussion on some of the limitations of the project, while highlighting opportunities and recommendations.



### **5.2.1 Benefits**

The main benefits identified by the questionnaire and phone interview are as follows:

1. There were minimal financial costs associated with the implementation of the system. A scale of 1 to 10 was used to assess the significance of the impact, with 1 being not significant and 10 being very significant. Maggie rated the financial impact to the company as 1/10. The system was developed by a summer intern, with core staff contributing their time to document the steps in their tasks;
2. The time needed to manage the system had minimal impact on the overall resources of the company—1 to 2 hours per week for each employee engaged in the system's curation;
3. The knowledge management system increased efficiency and consistency in processes for old and new staff members. The staff consult the wiki/operations manual when they need to know how to complete a task. This saves time, as they no longer have to search for files or try to find old emails to see how a situation was handled in the past.

I asked Maggie Langrick the following questions to gauge the usefulness of the wiki:

- a. On a scale of 1-10, does the system help the organization examine existing practices and procedures? A score of 1 being strong disagreement and 10 being strong agreement, with any response 5 and over being counted as agreement. The system scored a 9.
- b. On a scale of 0-10, are participants satisfied with what they gain from the system? A score of 0 indicating that they are not at all satisfied and 10

indicating full satisfaction, with any response 5 and over being counted as satisfactory. The system scored a 6.

- c. On a scale of 1-10, are the system's accomplishments worth the resources invested? A score of 1 being strong disagreement and 10 being strong agreement, with any response 5 and over being counted as agreement. The system scored an 8.
  - d. On a scale of 0-10, how well does the program respond to the needs of the organization? A score of 0 indicating 0% and 10 indicating 100%, with any response 5 and over being counted as passing. The system scored an 8.
4. The system can be introduced in phases and lends itself to shifting to other formats. This is evident as there has already been work to shift the wiki to a Microsoft Word operations manual.

### **5.2.2 Challenges**

The main challenges identified by the questionnaire and phone interview are as follows:

1. The user experience of the system is cumbersome for users who do not use the wiki platform frequently, i.e., clients and freelancers;
2. The knowledge management system was extremely labour-intensive to create;
3. The system does not fit well with the organization's educational needs and the learning styles of some of the target groups;
4. Considerable investment of resources would be needed to help improve the appeal of the wiki platform to users across the company, including freelancers and clients (authors).

Despite the challenges faced by the knowledge management system, including the perception that it is not as user-friendly as first believed, which has hindered its expansion to freelancers and clients, the staff at LifeTree Media believe that it does respond to the needs of the company and is worth the resources invested. The most used sections of the wiki are those that help in the execution of technical procedures, such as inputting metadata and uploading files to be printed, e.g. document specifications. Conversely, the least used sections are those that explain day-to-day tasks and project phases, as the staff feel more comfortable in these areas, although these notes are still beneficial and may be heavily referenced by new members of staff during on-boarding, and in their early days as members of the team.

The survey found a feeling that the hours saved through the use of the tool is not yet equal to the hours spent creating it. However, this may change over time with the addition of new team members, and the expansion of processes. Having a detailed explanation of processes on-hand will definitely ease the pressure on the time needed by all staff, in training, troubleshooting or testing new ideas.

Maggie Langrick was asked to identify 3 program results that would encourage the continuation of the system. Her responses included:

1. Substantial savings in worker time spent on tasks;
2. Substantial reduction in errors and inconsistencies; and
3. Seamless information flow to external parties.

The questionnaire feedback saw points 1 and 3 receiving very low scores. However, there are factors that ought to be considered with respect to these scores. For point 1, it is difficult to assess whether there has been or could potentially be a substantial saving in worker time spent on tasks when the sample population is a group that was so closely involved in curating the information that has gone into the development of the system. These individuals may be very well seasoned in the company's processes, having been charged with writing the to-do and best practice scripts for the Wiki. A more objective sample population would be new staff members or persons who are not as steeped in the day-to-day management of the company.

With regard to point 3, it would be unrealistic to expect that the system would provide a tailored experience for freelancers and clients, as in the end the time allotment for the design of user group spaces was unequal. The time-intensive nature of the project limited us to focus heavily on the needs of the people who would use the information in the wiki most frequently, that is, internal staff. We also did not have an opportunity to troubleshoot the system to test some of our assumptions on what each user groups' needs would be in reality. The low score assigned to component 3 was, therefore, not surprising, but could possibly be improved if there were enough resources dedicated to the design of the freelancer and author sections. This would be aligned with our initial intention of creating spaces tailored to users' needs and possible points of entry—the design would also consider how these users would go about finding and engaging with the information.

Point 2 received a high score of 7/10, and is still an assumption. Maggie noted in the interview feedback that the company is unable, at this time, to capture data on worker hours or instances of inconsistency. With that said, the assumption points not only to confidence in the merits of the system, but the actual content. It would suggest that the team believe that the scripts that form the pages of the Wiki are a solid starting point for training and/or extending existing practices for the purpose of growth or scale.

### **5.3 Opportunities and Recommendations**

The survey brought to the fore two opportunities that, if leveraged, may make the practical application of a knowledge management system in the form of a wiki more feasible at LifeTree Media. The opportunities are focusing on i) the social impact the knowledge management environment could have on the organization, or ways it could be used to help make the organization more “social;” think LinkedIn and its sharing features. Also, and very importantly, ii) ways to fund the project.

#### ***On being social***

Knowledge management is not only technology-based, but also involves social and cultural shifts in the company. Addressing these concerns while developing the system would have tremendously increased the chances of a successful introduction and expansion. A more social framework ensures that the knowledge is not static or stale, as the social environment encourages constant updates, and amendments by way of commentary and sharing. It also allows employees and managers to readily question the ways in which tasks are executed, and if the methods and the very processes are in line

with the company's values. This discussion in some ways contributes directly to participants' feelings of being involved in the shaping of the organizational culture.<sup>45</sup>

A key recommendation arising from this point is the creation of a knowledge management strategy that outlines why and how the system is being introduced into the organization. This would ensure that there are specific milestones that can be objectively evaluated. The summer 2016 project resulted in the creation of the knowledge management infrastructure but did not, at that time, consider a strategy for introduction and review, especially in relation to the needs of different stakeholders who might be asked to engage with the environment being created. The hope was that participants would organically feel some attachment to the system, but no emphasis was given to tailoring or selling what was being proposed and created. These efforts would be executed as part of the sharing phase of the knowledge management implementation cycle.

### ***On funding***

For the long-term sustenance of the project, it would be advantageous to have dedicated funding to ensure its integration into the company's overall operations. The system, as a human resource development tool, at some point will need more than 1-2 hours of maintenance per week, if it is to be a worthwhile venture.

Possible funding opportunities might exist via the Canada Council for the Arts Digital Strategy Fund. This "supports initiatives that aim at developing a user-centred culture of

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45. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 97-98.

innovation, a rethinking of organizational culture, work procedures and leadership styles, and finally, the adoption and deployment of available technological solutions.”<sup>46</sup>

The following funding components may be applicable:

1. The Fund for Digital Literacy and Intelligence, which supports:
  - ii) training or ideation workshops that use participatory methodologies;
  - iii) experimentation with and mastery of new digital tools or technologies;
  - iv) development of user-based experiences;
  - v) studies, business intelligence, and networked sharing of digital training, knowledge and innovation.<sup>47</sup>
  
2. The Fund for the Transformation of Organizational Models, which seeks to fund:
  - i) digital visions or strategies;
  - ii) redesign exercises, meetings and other preparatory work;
  - iii) long-term viability of existing digital initiatives;
  - iv) creation of new networks, partnerships or alliances.<sup>48</sup>

LifeTree Media could very well qualify for this kind of funding, as they seek to develop the professional capacity of artists (authors, designers et al). The company would need

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46. "Digital Strategy Fund," Canada Council for the Arts, para 2, accessed May 13, 2018, <http://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund>.

47. "Digital Literacy and Intelligence," Canada Council for the Arts, accessed May 13, 2018. <http://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund/digital-literacy-and-intelligence>.

48. "Transformation of Organizational Models," Canada Council for the Arts, accessed May 13, 2018. <http://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund/transformation-of-organizational-models>.

to ensure that the proposal does not indicate an attempt to offset capital expenditures<sup>49</sup> or does not have its final goal as the digitization of documents, collections, or archives.<sup>50</sup>

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49. “General List of Ineligible Activities,” Canada Council for the Arts, accessed May 13, 2018. <https://canadacouncil.ca/funding/grants/guide/apply-to-programs/general-list-of-ineligible-activities>.

50. “Transformation of Organizational Models,” Canada Council for the Arts, accessed May 13, 2018. <http://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund/transformation-of-organizational-models>.



## 6. CONCLUSION

LifeTree Media, as a company interested in becoming “knowledge enabled,” must continue to actively work towards creating a culture that promotes knowledge sharing. The foundations of this process have been set with the employ of knowledge management tools, i.e., the wiki and/or Microsoft Word manual. Like many organisations that move towards knowledge structures, LifeTree Media will now have to grapple with issues of deployment, usage, and adapting/creating a learning culture. Mohapatra et al (2016) outline a four-phased implementation strategy to design, develop and deploy an effective KM system, which includes the following:

**Phase 1–Awakening**

**Phase 2–Actioning**

**Phase 3–Deployment**

**Phase 4–Maintenance and measurement**

In brief, these four steps combined call for:

- i) a review of the organizational vision, mission, and goals to ensure that the design of the knowledge management system is aligned;
- ii) infrastructure evaluation to determine/understand how the knowledge management system will be set up and deployed;

iii) incremental design, deployment, and analysis of the system;

iv) cultural change/shift to assist integration, perhaps considering the implementation or re-design of a reward structure to foster knowledge sharing, working towards employee commitment and the desired return on investment (ROI);

v) measuring the business impact of the system with predetermined metrics. The metrics should adequately capture the ROI on resources, as well as usage of the system. These measurements should reflect not only the financial impact but the competitive impact.<sup>51</sup>

These phases could still be implemented within the organization even with a shift from a wiki to a Word document-based operations manual.

LifeTree Media will benefit from the processes of capturing, coding, publishing, sharing and applying the collective organizational knowledge. David Garvin, in his *Harvard Business Review* article entitled “Building a learning organization,” points out that though “failed programs far outnumber successes, and improvement rates remain distressingly low,” companies that have been successful continuously re-affirm and have at the centre of their practices a commitment to learning.<sup>52</sup>

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51. Mohapatra, Agrawal and Satpathy, *Designing Knowledge*, 79.

52. David Garvin, “Building a Learning Organisation,” *Harvard Business Review* 71, no. 4 (July-August 1993): 78-91, accessed July 23, 2018, <https://hbr.org/1993/07/building-a-learning-organization>.

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# APPENDIX A– LifeTree Media Wiki Taxonomy

## FREELANCERS

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### Editorial tasks

- Introduction to LifeTree Media (Start Here)
- Performing concept development
- Roles and responsibilities for Substantive Editors
- How to manage a substantive edit with the author
- Editing guidelines
- How to write an Advance Book Information sheet (ABI)
- ABI creation guide
- Estimating page counts for text-only books
- Concept meeting checklist
- Scheduling of the editorial, design, and production process
- Style sheet guidelines
- Mark-up and inputting guidelines for typed material
- Paper line guidelines
- Jacket and cover copy
- Indexing guidelines for general non-fiction
- Editing indexes
- Author photo guidelines
- Archiving guidelines
- Roles and responsibilities of copy editors
- Common usage errors
- Roles and responsibilities of copy editors
- Common usage errors
- Roles and responsibilities of proofreaders
- How to manage a copy edit with the author
- Managing disagreements with the author
- Closing down a project phase with the author
- Proofreading guidelines
- Working with LifeTree’s systems
- Working with Asana
- Working within DropBox

### Editorial templates, forms, checklists and general documents

- ABI template for editors
- Transmittal sheet for project sponsors and in-house substantive editors
- Copyright page templates
- Substantive edit transmittal form
- Permission request letter
- Copy-editing checklist
- Proofreading checklist
- A tool for editors to structure their feedback
- Update form
- Book production schedule template

## Design tasks

- Overview of the LifeTree design procedures
- Cover art guidelines
- House style design guide
- Usage guidelines LifeTree logo and downloadable resource
- Half-title and title page components

## AUTHOR INSTRUCTIONS AND RESOURCES

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- Editorial handbook for authors (overview of the book development process)
- Substantive edit: How to respond to the editor's notes
- Copyedit: How to respond to your editor's notes
- Footnotes/Endnotes: How to gather and compile them
- Blurbs/Endorsements: How to gather them
- Foreword: Why it matters, how to get a good one
- Using Dropbox
- Track changes: How to use it
- Adobe PDF markup: How to use it
- Author photo guidelines
- Amazon guide
- SEO terms and tips
- How to track your platform metrics
- Author earnings report: How to read it
- All about ebooks
- Choosing your book's physical specs
- Choosing your print run quantities
- Using quotes and copyrighted content
- Gathering research
- All about media and PR
- All about distribution
- How to format and name manuscript files
- Proofreading your book
- Your book launch
- Amazon giveaway scripts and funnel



## INTERNAL

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### Human resources

- Managing freelancers—notes and tips
- Conducting interviews
- Assigning freelancers (proofreaders, copy editors, substantive editors, designers et al)
- Employee performance review procedures
- List of current freelancers

### Project management

- Setting up a new project
- Closing down a project

### Admin and Sales

- Managing archives
- Invoicing clients
- Best book program funnel
- Marketing services funnel
- Processing web submissions

### Marketing

- Brand guide and assets
- Content marketing guidelines
- Finding comparative titles

### Transitions

- Transition from substantive edit to copy edit
- Transition from copy edit to proof
- Transition out of proof
- Beginning the copy edit phase

### Client care

- Onboarding a new client
- Creating status report
- Dealing with complaints
- Piracy script
- Handling book submissions from online contact forms
- Expressing interest in a Best Book application

### Finances

- Handling supplier invoices
- Invoicing clients

### How tos

- Email script—communicating with copy-editor
- How to use Asana
- Notes from previous copyediting
- Email script—ordering author copies
- Handling international book orders
- Determining a book's price
- Determining a book's release and publication dates