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Identifying and sharing best practices

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Identifying and sharing best practices

What is identifying and sharing best practices?

The sharing of practices is often one of the first things to be carried out in a knowledge management initiative. In most organisations it is already being done to some degree. This often begins with common practices such as instruction manuals or 'how to' guidelines. The next step from there is to identify and share best practices.

A best practice is simply a process or a methodology that represents the most effective way of achieving a specific objective. Some people prefer to use the term 'good practice' as in reality it is debateable whether there is a single 'best' approach – and of course approaches are constantly evolving and being updated. So another way of defining a best practice is one that has been proven to work well and produce good results, and is therefore recommended as a model.

Much of best practice knowledge is tacit - held in people's heads and not always easy to document. Therefore most best practice programmes combine two key elements: explicit knowledge such as a best practices database (connecting people with information), and methods for sharing tacit knowledge such as communities of practice (connecting people with people). These two approaches are complementary. A database can provide enough information for a potential user of the best practice to find it and decide if it is worth pursuing further. However the best way of sharing best practices is 'on the job' and so communities and personal contact with others who have used the best practice is key.

What are the benefits?

The essence of identifying and sharing best practices is to learn from others and to re-use knowledge. Effective sharing of best practices can help organisations to:

- identify and replace poor practices
- raise the performance of poor performers closer to that of the best
- avoid reinventing the wheel
- minimize re-work caused by use of poor methods
- save costs through better productivity and efficiency
- improve services to patients.

Best practice programmes are most appropriate in organisations where processes are quite well developed and where a certain amount of knowledge and experience has been accumulated. They are most useful where an organisation has several units or people performing similar tasks but who are widely dispersed and so do not tend to learn from each other through day-to-day contact.

How do I go about it?

In Best practices in best practices (see '[Resources and references](#)' below for details), David Skyrme recommends a 6-step approach to identifying and sharing best practices. This is summarised here. The overall approach is aimed at documenting the essential features of a best practice, giving pointers to relevant experts in that practice, deducing general guidelines, diffusing basic knowledge, and using subject matter experts to apply and adapt the practices in a new context.

The key steps are as follows:

1. Identify users' requirements

This step may sound obvious, but it is not uncommon for someone given the task of capturing best practices to start by designing a database, when clearly this is a case of putting the cart before the horse. Start by considering where you can really add value. Look at what areas of the organisation need attention because of poor performance or difficult challenges. Who can most benefit from better knowledge and understanding of best practices? How will they access and use them?

2. Discover good practices

There are various methods of identifying best practices. One approach is to look at who is producing excellent results and is therefore likely to be using good practices. Having discovered these people, you will then need to discern which parts of their overall approach or methods being used are actually good practice. This is best done by people knowledgeable in the relevant practices such as subject matter experts, internal auditors, consultants and peers. A range of alternative approaches for identifying best practices can be found within various knowledge management tools. These include [communities of practice](#), [after action reviews](#), [knowledge harvesting](#) and [exit interviews](#). Don't necessarily limit your search to only include practices within your organisation; much can be learned from the practices of other organisations in your field, or even organisations in other industries.

3. Document good practices

Best practice descriptions are usually kept in a database in a standard format. A typical template might include the following sections:

- Title – short descriptive title; this can be accompanied by a short abstract.
- Profile – several short sections outlining processes, function, author, keywords etc.
- Context – where is this applicable? What problems does it solve?
- Resources – what resources and skills are needed to carry out the best practice?
- Description – what are the processes and steps involved?
Improvement measures – are there performance measures associated with this practice?
- Lessons learned – what proves difficult? What would the originators of the practice do differently if they were to do it again?
- Links to resources – experts contact details, workbooks, video clips, articles, transcripts of review meetings.
- Tools and techniques used.

The aim at this stage is not to describe the practice in great detail, but to give enough information to allow users of the database to decide whether it matches their needs and where they can find further information. A key consideration is how you organize and classify the information in your database so that users can readily find what they need.

4. Validate best practices

A practice is only 'good' or 'best' if there is a demonstrable link between what is practiced and the end result. In most organisations, and especially in areas where practices are constantly evolving, rigorous cause-and-effect analysis is impracticable. Hence a degree of subjective judgement is needed as to what constitutes 'best'. A common approach is to have a panel of reviewers comprising internal and external subject experts and peers, who evaluate a potential best practice against their knowledge of existing practice. It is equally important to ensure that you seek input and feedback from customers (i.e. the ultimate beneficiaries, such as patients) of the best practices.

In the context of the NHS, a further important consideration is that of evidence-based practice. When identifying and validating best practices, it is important to ensure that these are based on a combination of both on-the-job experience and sound research evidence.

5. Disseminate and apply

While a database of best practices is a useful starting point, most organisations find it essential to complement this with face-to-face knowledge sharing about those best practices. This is where the real value is added. Not only does it help the recipient dig beneath the explicit knowledge and gain more in depth insights, but it can also provide a two-way benefit in that dialogue between the conveyor of best practice knowledge and the recipient can enrich the knowledge of both.

Common ways of sharing best practice knowledge include: communities of practice; improvement groups or quality circles in which teams within an organisation meet regularly to discuss ways of improving a process; visits to other departments or organisations with good performance; organised learning events such as share fairs that bring people together to share specific knowledge and experience; job secondments or exchanges; etc.

6. Develop a supporting infrastructure

To successfully implement a best practice programme, you need to ensure you have the required infrastructure in place. This infrastructure is often developed as part of a wider knowledge management strategy. Typically, several generic aspects need attention:

- The people to facilitate and drive the process through its initial stages, until it becomes embedded in the organisation's ways of working (e.g. a best practices team, or a network of best practices co-ordinators).
- The technical infrastructure for document sharing and databases.
- The content management infrastructure to ensure that best practices are documented and classified electronically in a way that makes them easy to find.

Are there any other points I should be aware of?

- Establishing a programme to identify and share best practice is not generally a 'quick fix' solution for organisations that are relatively new to knowledge management. Setting up the required processes and infrastructure can be quite a big task, unless you already have some aspects of a knowledge management infrastructure in place.
- As with any knowledge management initiative, don't forget the importance of motivation and culture. The ease with which good practices emerge and are shared depends on the culture of your organisation. If there is a 'not invented here' culture, then good practices will be slow to emerge and spread, as each part of the organisation will defend its own way of doing things rather than learning from, and sharing with, others. Where people are generally encouraged to seek out knowledge and learning, best practices are more likely to emerge and spread.
- Try not to get too prescriptive about best practices. Rather than putting in rigid rules that say

‘this is best practice and you should follow it’, focus more on encouraging people to develop and share best practices voluntarily.

- Do not make the mistake of focusing on capturing best practices for the sake of capturing them. Focus on how they can be used to add value. Who are the users? What are their issues? What kind of knowledge do they need to perform better? How might they best assimilate that knowledge?
- You will need to actively promote your best practice resources. Otherwise you may end up with databases and people that are under-used and not fulfilling their potential.
- Be sure to demonstrate the benefits and the evidence. Use case examples to show the benefits of sharing best practices, and as far as possible, demonstrate how a best practice has contributed to better performance.
- Remember that best practice is constantly evolving. Therefore feedback mechanisms must be built in so that the value of existing best practices is constantly assessed, and feedback used to create further improvements.
- Resist the temptation to focus on explicit knowledge – it cannot be emphasised enough that databases of best practices are insufficient. Databases point to examples and people, but it is through people that deep knowledge is transferred.
- Spreading good practice across the NHS is already happening on a number of levels. On a national level, as part of the Modernisation Agency, the NHS Beacons Programme (see [‘Resources and references’](#) below) is identifying services that have been particularly innovative in meeting specific healthcare needs, and encouraging them to share their experience so that others can benefit by using or adapting original ideas to suit their own circumstances, saving time and resources and avoiding duplication of effort

Resources and references

Books and guides

- Clemmons Rumizen Melissie. (2002) *The complete idiot’s guide to knowledge management*. Madison, WI: CWL Publishing Enterprises.
Chapter 9: Strategic choices for connecting people to people.
Provides a fairly brief overview of best practice systems, but does include an interesting case study featuring the American Red Cross. (Again, this book as a whole is well worth a look – extremely easy to read, very comprehensive and full of sound, practical advice).
- Collison, Chris and Parcell Geoff. (2001) *Learning to fly: practical lessons from one of the world’s leading knowledge companies*. Oxford: Capstone.
Chapter 11: Leveraging what we’ve learned.
Touches fairly briefly on best practices as part of a wider review of capturing and sharing knowledge and learning. (This book as a whole is well worth a read – refreshing low on theory and jargon, and high on sound, practical advice based on proven results).
- Skyrme David J. (2002) [Best practices in best practices](#). David J Skyrme Associates.
A 17-page guide available for online purchase either as a pdf file or in hard copy at £7. Provides a 6-step process of identifying, discovering, documenting, validating, applying and developing a best practices programme, and includes case studies. Well worth buying if you are thinking of following this route.
- Zairi, Mohamed. (1998) *Benchmarking for Best Practice: The Art of Applying Effective Quality Management*. Butterworth-Heinemann

A useful overview with both theory and practice, as well as case studies.

Articles

- Kwiecian, Stan. Best practice replication: the evolution of KM at Ford Motor Company. Knowledge Management, 2001, October, Vol 5 No 3
Explains how in 1995 Ford initiated a scheme to make it easier for its dispersed factories and divisions to communicate and replicate best practices.

Websites

- The NHS Beacons Programme – Leading and Learning – Knowledge Transfer in Beacon Council Scheme. Click [here](#) for details.

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