Finding and Analyzing the Knowledge Needs in a Financial Organization – Case Study/

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Abstract

The research examined the connection between knowledge transfer and technology in Kesselman & Kesselman, CPAs. Kesselman & Kesselman is the Israeli representative of the world's leading accounting services firm, PricewaterhouseCoopers.

In the study, a number of questions were examined by means of interviews that were conducted with employees within the organization. As this study is qualitative, no assumptions were defined – only research questions.

Central question:

Do the existing technological tools create dynamics of knowledge transfer in the organization?

Sub questions:

a] Where is the layering knowledge durability in the firm? In other words, where are the experts situated? Are there different degrees according to the organizational hierarchy?

b] Does the organization fully utilize the technology potential relating to knowledge transfer within the organization? In other words, does the organization make optimal usage of all the technology resources at its disposal? Is all knowledge layering within the organization appropriately treated?

c] Are the technological resources adapted to the different information needs of the organization? What is the degree of satisfaction at different hierarchal levels within the organization with respect to the tools that exist for knowledge transfer?

Semi-structured interviews were used in the study as the method for collecting data. In the study 19 employees from various departments of the firm were orally interviewed. All interviews were immediately written out and catalogued. Because the author of the work has been employed in the firm for the last six years, approaching

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the sample population was simple and requests for participation were sent by means of e-mail. The analysis unit in the study is the sample population that was interviewed and, according to the answers received, conclusions were drawn regarding the connection between the technology and knowledge transfer within the organization. Since the subject is an international organization, the technological tools that serve the organization are many and varied. By the same manner, knowledge layering is characterized according to different departments, different hierarchal levels and the different capabilities of different personnel.

The organization's departments use the systems of the international firm, systems of the Israeli firm and external resources. A problem arises due to over-reliance on the international firm's systems and insufficient development of systems suited particularly to the Israeli firm's needs. As to the use of the different functions of the systems, while interviewees were aware of the multitude of functions, the majority indicated that the organization does not make full use of the technology potential for knowledge transfer and that this is due to lack of time and guidance. Interviewees also noted a lack of functions for non-formal knowledge transfer. In other words, there is almost no transfer of hidden knowledge within the organization – either vertically or horizontally. The organization's existing tools are appropriate to its information needs, as a major part of these are tools that the international firm has constructed based on many years' experience and the investment of considerable resources. One problem that was noted however is a technical problem concerning the international intranet system, which constitutes a very important tool for the Israeli firm. Due to information overload, searches within the site are very difficult and the connection is frequently severed during surfing. An additional problem that was highlighted is the lack of a knowledge coordinator and software that can bring together all the accumulated knowledge. Nevertheless, despite the problems and the various suggestions made for improving the systems, the majority of interviewees indicated that they are satisfied with the organization's systems. This might be explained by the fact that most of the systems are fine for the purposes for which they were intended, but they are not appropriate for the purpose of knowledge transfer within the organization. The use of the international firm's technological tools proves itself and a large proportion of the interviewees indicated that they use the international firm's databases for documentation and sharing. Furthermore, these tools are also employed for learning from the experience of others and for drawing conclusions. There are

many knowledge layers within the organization and there is some degree of segregation in the use of technology tools between the different layers.

Thus, managers use more sophisticated systems and juniors use simpler systems from the aspect of data analysis. The service groups in the organization are characteristically the main users of the technological tools needed for knowledge transfer.

The explanation for this is in the nature of their role. The service groups' main purpose is to provide advice and transfer knowledge, and it is thus not reasonable that they would have problems regarding knowledge transfer. The main problem arises with the other departments, each of which has its own unique tools but very few advanced communications media inside the departments and between departments.

In this research use has been made of Susan Henczel's **Information Audit** plan. This plan enables the organization to diagnose its information needs, to define the resources that exist to meet these needs, to map the information flow within the organization and in its surrounding environment and to identify system deficiencies. This research examined where the organization can be placed, among the various stages of Henczel's Plan. Henczel suggests a seven-stage model to implement her plan: 1. **Planning** – understanding the organization, determining resource allocation, choosing a methodology, enlisting management support. 2. **Data collection** – data relating to information required to perform tasks and activities. 3. **Data analysis** – general analysis, significance analysis, mapping of information flows. 4. **Data evaluation** – biased distribution of resources, gaps in the provision of resources, information overload issues, lack of transparency. 5. **Communicating the recommendations** – written reports, oral presentation, seminars, bulletins. 6. **Implementing the recommendations** – dealing with the necessary changes. 7. **The continuum** – when changes occur in the organization, the change in the needs will be adapted to the existing systems or to the new systems (Henczel, 2001).

The findings of this study show that the organization is at the start of the first stage of Henczel's plan – the planning stage. Determining resource allocation and choosing appropriate methodology will enable major progress along Susan Henczel's stages, as the findings show that the technology potential in the organization is large but that utilization is insufficient. The help of appropriate methodology will enable major

progress along Susan Henczel's stages towards optimal knowledge transfer in the organization. An appendix and bibliography are attached.

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