Strategies for Developing a **Knowledge-Driven Culture** in Your Practice

Your practice's success may depend on getting those who work for you to share what they know. Here's how to do it.

A. John Orzano, MD, MPH
Alfred F. Tallia, MD, MPH
Claire R. McInerney, PhD
Reuben R. McDaniel Jr., EdD
Benjamin F. Crabtree, PhD

Family practices are challenged to increase productivity, enhance patient care and provide a satisfying work environment for all staff. To understand why some have succeeded while others have struggled, our research group analyzed more than 160 family practices across the country in terms of their clinical and financial outcomes. This work has identified a number of key contributors to practices' success. We described one of these, the presence of good work relationships, in a previous *FPM* article.[1] Another contributor to success relates to how effectively groups capture, organize and share the knowledge and experiences of individuals in the group and make the information available across the practice – a process known in the business community as knowledge management. This article describes how to foster effective knowledge management in your practice.

Facilitate talk

One key knowledge management strategy involves getting practice members to talk to each other about things of benefit to the practice. These discussions can be organized around a tool as sophisticated as an electronic health record (EHR) or staff Intranet or as simple as a coffee machine or nurses' station. Our research has shown that low-tech tools often trump more expensive ones in fostering work-related conversations that transfer knowledge and improve patient care. Consider these examples:

• The hallway consult between two clinicians about a patient with nonspecific symptoms that leads to a definitive diagnosis;

• The break room discussion between a receptionist and

JIM FRAZIER

By spending time and money to facilitate conversations of benefit to the practice, successful practices seem to have more of both.

part-time nurse that leads to a schedule change and more efficient patient flow.

Opportunities for informal interaction are especially important because the knowledge exchanged during these conversations helps employees connect with the practice. Staff members learn the culture of the practice, build trust and develop a sense of value that helps them overcome the hesitation to ask questions and share ideas.

Successful practices resist the perception that "idle" conversation is necessarily inefficient and wasteful. They actively encourage interaction by creating common areas where group members can talk informally and work together and by allowing time for regular meetings.

In addition to creating the space and time for meetings, successful practices encourage participation. Rather than being simply a means to transmit information, meetings are used to gather input, reflect on and solve problems related to current and anticipated challenges, evaluate outcomes of previous decisions, make informed adjustments, provide

recognition for ideas and celebrate their successful execution. By spending time and money to facilitate conversations of benefit to the practice, successful practices seem to have more of both.

Encourage action

Empowering employees to put knowledge into action is also critical. Fear and competition often prevent people from doing what they know they should do, so successful practices promote trust and reward risk taking. As a result, people are more likely to act on what they know. Consider these examples:

• A nurse supervisor champions a different configuration of nurses to clinicians that doesn't turn out as well as expected, prompting a return to the previous arrangement. Rather than criticize the employee or focus on how disruptive the change was, practice leaders should reward the employee with genuine encouragement to test other new ideas in the future.

• A receptionist confronted with a potential add-in decides how best to schedule the patient based on what she knows about the patient's needs and the doctor's availability. If the physician chastises her for making an "unauthorized" schedule change, she is likely to punt future requests to another staff member, thereby reducing the efficiency and effectiveness of the practice. Instead, the physician should support her effort. ➤

■ Managing knowledge effectively requires getting everyone in the practice to share what they know.

■ Formal and informal discussions can be productive.

■ Meetings should be used for exchanging information, not just transmitting it.

About the Authors

Dr. Orzano is associate professor in the Department of Family Medicine at the University of Medicine and Dentistry of New Jersey, Robert Wood Johnson Medical School (UMDNJ-RWJMS), New Brunswick, N.J. Dr. Tallia is associate professor and chair of the Department of Family Medicine at UMDNJ-RWJMS. Dr. McInerney is associate professor in the School of Communication, Information and Library Studies, Rutgers University, New Brunswick, N.J. Dr. McDaniel is the Charles and Elizabeth Prothro Regents Chair in health care management and professor of information, risk and operations management in the McCoombs School of Business at the University of Texas, Austin. Dr. Crabtree is professor and research director in the Department of Family Medicine, UMDNJ-RWJMS. The authors wish to thank the many community practices that have allowed the research team to learn from their experiences. Author disclosure: nothing to disclose.

SUGGESTED READING

The Knowing-Doing Gap: How Smart Companies Turn Knowledge Into Action. Pfeffer J. Boston: Harvard Business School Press; 2000.

Working Knowledge: How Organizations Manage What They Know. Davenport T, Prusak L. Boston: Harvard Business School Press; 1998.

The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation. Nonaka I, Takeuchi H. New York: Oxford University Press; 1995.

The way staff members talk about their work – or one another – also creates barriers to action, which must be addressed for practice initiatives to have a chance to succeed. For instance, a staff member in one practice was tasked with ensuring that physicians complied with coding rules. The office manager observed that the staff member was being referred to as a "pest" and her advice was being largely ignored, so she decided to reframe the staff member's role and the purpose of compliance. At a practice meeting, the office manager discussed their efforts to improve coding and their overall goal of improving reimbursement and introduced the staff member as a "guardian angel." The rest of the staff came to see her efforts to clarify a diagnosis or service code as helping them to receive the reimbursement they had earned.

By creating a trusting environment where risk taking is encouraged, practices empower members of the group to act on what they know.

Knowledge management tools such as procedure manuals and clinical protocols help capture and preserve essential information.

Job and task rotation and staff meetings are examples of social tools that help practices to manage knowledge more productively.

Preserve knowledge

Minimizing disruption caused by employee turnover also is a key to success. High-performing practices realize that much of their success is a result of what each member in the practice knows. They embed this knowledge in the practice using a variety of technical and social tools (see "Knowledge management tools" below). Operational procedure manuals and clinical protocols are examples of technical tools that can preserve knowledge. Social tools, such as job and task rotation, often complement these technical ones.

Practices can make their existing tools more effective by implementing them throughout the organization and using a balance of technical and social tools. Practices should also involve staff in developing new tools for preserving knowledge, evaluate the effects of the tools and keep them up-to-date.

Simple strategies

The practice of medicine has always relied on the expertise of clinicians and those who support them. As medicine has become increasingly complex, both clinically and administratively, developing and sharing organizational knowledge has become essential as well. While sophisticated technical tools such as EHRs can certainly help practices to manage knowledge, often the most successful strategies involve simple, low-tech efforts that help people talk to each other and work together to implement the mission of the practice. In so doing, practices discover and share new and improved ways of operating and more satisfying work relationships. **FPM**

Send comments to **fpmedit@aafp.org**.

1. Tallia AF, Lanham HJ, McDaniel RR, Crabtree BF. Seven characteristics of successful work relationships. *Fam Pract Manag.* January 2006:47-50.