



Knowledge Links™
**Individual Survey
and
Interpretation of Results**

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Knowledge Complexity Framework©



This assessment instrument makes use of the *Knowledge Complexity Framework©*, a framework that helps individuals - and the people they work with - identify strengths and needs.

The *Knowledge Complexity Framework©* represents seven distinct levels that are important for learning and high performance. It is easy to use, yet comprehensive and systemic so it can encompass complexity. While this assessment tool is designed for use by individuals, the Matrix itself is useful at the individual, team **and** organizational level. It provides a common language for tasks, helping people understand the tools and skills needed for:

- ◆ working effectively
- ◆ responding quickly
- ◆ moving creatively into the future.

Knowledge Links™ Individual Survey

Section A

Multiple choice questions about YOU, in your workplace, at this time

GUIDELINES

- I. There are 20 statements (questions) below.
- II. For each question choose the **one** answer that best fits you, **at this time**, in your work situation.
- III. Circle its letter.

1. I do my best work on a project when...

- athere are the right people and resources to do the job
- bI get to pull all the pieces together in a way that everyone understands
- ceverything I need is very organized and close at hand
- dI have mapped out a clear flow of the work process
- eeveryone is flexible enough to change midstream

2. I make decisions most often based on...

- ausing resources most effectively
- bconformance to expected standards and procedures
- cmy own values and standards
- dwhat I intuitively feel is most appropriate
- ewhat best fits our group's way of working

3. When I organize my work, I...

- a ...do what attracts me to work on at the moment
- bcontinually prioritize my tasks and do them in order
- cjuggle many tasks at once, and move quickly back and forth between all of them
- d ...may work on several projects at a time but focus my energy on the most urgent
- ework on one project at a time until it is done

4. I like to receive instructions which...

- a ...explain specific goals and desired results
- binclude the thinking processes behind the steps
- cgive all the details for each step
- dexplain the overall purpose and value for doing the task
- eare simply an outline of the major points and steps that I can fill in as I go

5. If I had to pick one of these, I would most enjoy...

- a.* ...wrapping up all the details of a project
- b.* ...pulling a team together to get something done
- c.* ...determining the most efficient way to do something
- d.* ...playing with new ideas and doing innovative things
- e.* ...creating a project that will help the community

6. I feel satisfied in my work when...

- a.* ...I am making a contribution to my team
- b.* ...I have checked off everything on my "to do" list
- c.* ...I feel it is meaningful to my life
- d.* ...I am working efficiently
- e.* ...I have pulled many different pieces together into a creative whole

7. In working with other people, a natural role for me is...

- a.* ...holding the "big picture" for the group
- b.* ...keeping meetings and schedules on track
- c.* ...clarifying values and purpose
- d.* ...fleshing out the details of ideas
- e.* ...clarifying priorities, specific goals and objectives

8. When working in a group, I feel that the most important thing is that...

- a.* ...roles and responsibilities are clearly defined
- b.* ...each task is clearly defined
- c.* ...the group designs the work together
- d.* ...we are all following a clear plan of action
- e.* ...everyone understands the purpose

9. The task I enjoy the most is...

- a.* ...long-term planning and strategizing
- b.* ...developing a vision
- c.* ...creating processes or work flow and other road maps
- d.* ...defining goals and objectives
- e.* ...developing procedures and standards

10. When the copier has a paper jam while I am using it, I am most likely to...

- a.* ...forget it for now and go do something else
- b.* ...open it up and fix what I can without instructions
- c.* ...go look for another copier
- d.* ...find the instruction manual and read the directions
- e.* ...ask someone for help

11. My “to do” list is...

- a. ... updated daily and very detailed so I can check off each item as it is completed*
- b.... notes to myself scattered around my workspace*
- c simple and updated only as needed*
- d.... in my head and almost never gets written down*
- e a combination of things such as calendars, lists, tickler files, notes*

12. When I give instructions I like to...

- a. ... walk people through the whole process*
- b.... communicate the values and purpose and “why” very clearly*
- c define detailed procedures for each step*
- d.... explain the reasoning and logic for each activity*
- e focus primarily on expected results and output*

13. If I am looking for an address and get lost, I...

- a. ... ask people for help*
- b.... use trial and error to find the right place*
- c save the errand for later*
- d.... call for directions*
- e try to find a map*

14. In a meeting, I like to...

- a. ... make sure all ideas are heard*
- b.... inspire people with hope for future success*
- c bring things to closure*
- d.... complete a detailed action list*
- e brainstorm new ideas*

15. I prefer to...

- a. ... have a lot of balls in the air for variety*
- b.... have responsibility for one or two unusual or special projects*
- c allocate my time to several critical oversight tasks*
- d.... consistently attend to the everyday work flow*
- e divide my work into simple tasks that can be completed in order*

16. I like work processes that...

- a. ... have been analyzed for effectiveness*
- b.... create deep alignment between people*
- c are uniquely designed for the situation at hand*
- d.... have worked well before*
- e are fresh and innovative, even though they may be riskier*

17. I like to work with people who...

- a.** ...follow the rules
- b.** ...stimulate my thinking
- c.** ...share my values
- d.** ...don't slow down the process
- e.** ...know how to work together

18. When I receive a 3-page memo on a new company policy, usually I first...

- a.** ...read it from front to back
- b.** ...read most of it, then file it
- c.** ...skim the entire document to see what applies to me
- d.** ...put it where I can read it later
- e.** ...see what other people are doing and how they are responding

19. People come to me most often when they need...

- a.** ...help to set priorities
- b.** ...to relax and play a bit
- c.** ...someone to check their completed work
- d.** ...someone with whom they can bounce around ideas
- e.** ...to be shown how to do something

20. Most people would say I am a person who...

- a.** ...always seem to see connections others don't
- b.** ...organizes everything I do in detail, even my drawers
- c.** ...is highly creative but has trouble with detail work
- d.** ...is a natural project manager
- e.** ...follows the rules and is a creature of habit

Knowledge Complexity Framework©



The *Knowledge Complexity Framework*© helps us understand learning and performance patterns. As we learn, we organize DATA in the greater, more comprehensive wholes of INFORMATION and KNOWLEDGE. Then KNOWLEDGE becomes MEANINGFUL in the larger context of our culture, underlying beliefs, and PHILOSOPHY. Our PHILOSOPHY is very much shaped by our WISDOM and values.

Each of these levels translates into a particular type of performance. For example, the learning level of INFORMATION, which involves organizing data, creating simple linkages and sorting into categories translates into the PROCEDURAL level of performance. Procedures also have to do with simple, linear types of organization, such as developing the steps of a process or defining standards.

More complete descriptions of the performance levels is in the section, "**Interpretation of Results**". This framework is described in detail in the book, *The Knowledge Evolution: Expanding Organizational Intelligence*, published by Butterworth-Heinemann, 1997, by Verna Allee.

As individuals, we each have a personal "comfort zone" where we do our best work. Our personal performance challenge is to access all the levels that are available to us and expand our own capability. By understanding these levels we can also deepen our appreciation of the skills and strengths of the other people we work with, and identify the learning and performance needs in our team or organization.

Knowledge Links™ Individual Survey

Section B

Plotting the survey results

GUIDELINES

The 20 numbered **rows** in the chart refer to the 20 questions in the Survey.

The five **columns** full of letters represent the possible responses to the 20 questions.

I. Circle each of your responses.

II. Total the **number** of circles in each column & enter the **total number** in the Column Totals.

The last row is labeled with five of the Levels of Learning and Performance.

***The higher your number is in the Column Total,
the more characteristic you are of the corresponding Level.***

QUESTION NUMBER	RESPONSES				
1.	<i>c</i>	<i>d</i>	<i>a</i>	<i>b</i>	<i>e</i>
2.	<i>b</i>	<i>a</i>	<i>e</i>	<i>d</i>	<i>c</i>
3.	<i>e</i>	<i>b</i>	<i>d</i>	<i>c</i>	<i>a</i>
4.	<i>c</i>	<i>e</i>	<i>a</i>	<i>b</i>	<i>d</i>
5.	<i>a</i>	<i>c</i>	<i>b</i>	<i>d</i>	<i>e</i>
6.	<i>b</i>	<i>d</i>	<i>a</i>	<i>e</i>	<i>c</i>
7.	<i>d</i>	<i>b</i>	<i>e</i>	<i>a</i>	<i>c</i>
8.	<i>b</i>	<i>d</i>	<i>a</i>	<i>c</i>	<i>e</i>
9.	<i>e</i>	<i>c</i>	<i>d</i>	<i>a</i>	<i>b</i>
10.	<i>d</i>	<i>b</i>	<i>e</i>	<i>c</i>	<i>a</i>
11.	<i>a</i>	<i>c</i>	<i>e</i>	<i>b</i>	<i>d</i>
12.	<i>c</i>	<i>a</i>	<i>e</i>	<i>d</i>	<i>b</i>
13.	<i>d</i>	<i>e</i>	<i>a</i>	<i>b</i>	<i>c</i>
14.	<i>d</i>	<i>c</i>	<i>a</i>	<i>e</i>	<i>b</i>
15.	<i>e</i>	<i>d</i>	<i>c</i>	<i>a</i>	<i>b</i>
16.	<i>d</i>	<i>a</i>	<i>c</i>	<i>e</i>	<i>b</i>
17.	<i>a</i>	<i>d</i>	<i>e</i>	<i>b</i>	<i>c</i>
18.	<i>a</i>	<i>b</i>	<i>e</i>	<i>c</i>	<i>d</i>
19.	<i>c</i>	<i>e</i>	<i>a</i>	<i>d</i>	<i>b</i>
20.	<i>e</i>	<i>b</i>	<i>d</i>	<i>c</i>	<i>a</i>
COLUMN TOTALS					
Level of Learning and Performance	<i>Information Procedural</i>	<i>Knowledge Functional</i>	<i>Meaning Managing</i>	<i>Philosophy Integrating</i>	<i>Wisdom Renewing</i>

Knowledge Links™ Individual Survey

Section B

Plotting the survey results
Make-your-own bar chart

GUIDELINES

- I. Refer to the Column Totals in the chart on the previous page.
- II. Shade each **row** below, from the left, from number one through the total number for each of the levels in turn.

When completed, your graph will look similar to the **EXAMPLE**.

EXAMPLE

SAMPLE SECTION OF A COMPLETED GRAPH

Knowledge Functional	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Meaning Managing	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

INDIVIDUAL PROFILE

Level of Learning and Performance	TOTALS FROM COLUMNS TOTALS ON THE PREVIOUS PAGE																			
Informational Procedural	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Knowledge Functional	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Meaning Managing	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Philosophy Integrating	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Wisdom Renewing	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Knowledge Links™ Individual Survey

Section C

Interpretation of results How to interpret your results

This assessment is designed to help you determine your comfort zone, and understand where in the spectrum of learning your own natural talents reside. We all have a natural “comfort zone” where we do our highest and best work.

We all function to some degree at all of the levels. We could not navigate our daily lives and tasks otherwise. There is no one level that is more desirable than any other. Whether an individual or team, it is important to perform well at all these levels. If there are “gaps,” then we need to appreciate that some tasks will feel more difficult, or arrange support for ourselves by outsourcing some tasks or bringing in special talent.

To understand your results, look at the profile that emerged. Your comfort zone is where you “scored” the highest. The areas where you have few or no points are performance levels that represent a much greater challenge.

In the following pages, ***read the sections that correspond to your highest “score.”***

NOTES:

It is common to find a strong comfort zone in one area, and that the levels immediately next to it are also areas of strength. It is easier to expand our talents by working outward from what we already do well, rather than trying to make a “leap” of two or more levels.

You may have results spread almost evenly over four adjacent levels. If so, you may wish to read the sections corresponding to only the two highest scores, or you may read only one section that hits closest to the center.

It is rare to find an individual who is equally comfortable at all the levels, although there are some people who are. If your results were evenly balanced in this way, it indicates that you have a great deal of flexibility. You are probably comfortable working with almost anybody, and can adapt your style easily to the task at hand. Within that balance however, there are probably particular skills that you could develop.

If, you find almost all your results were heavily weighted in only one or two areas, you probably are uncomfortable working at tasks that are outside your comfort zone. For example, someone who is very strong in PROCEDURAL and FUNCTIONAL might be impatient with the process of

developing a group vision or mission. Conversely, an extremely INTEGRATING person would tire quickly if trying to develop detailed specifications, or following a rigorous methodology.

Don't be alarmed if your results show a "split." This may mean you have a natural comfort zone in one of the areas, but your daily work over time has given you strength and skill in another, very different, area. As we gain work experience in many different task areas, we begin to round out our profile.

It is very tempting to try to identify a particular area with a certain job function. One example of this would be data entry, which functions at only one level, but the individual doing the task is multi-faceted. As another example, MANAGING does not mean only "managers" do the work of this level. Especially with the move to self-managed work teams, it is important that everyone have capability at this level to some degree. As cross-training and teams become more important, job functions are becoming more fluid also. This is all the more reason to understand your strengths, and also know when you need support to do something that is more difficult.

PROFILES begin on the following page.

Knowledge Links™ Individual Survey

Section D

Profiles

DATA

Level of Learning DATA, instinct, awareness
Performance Focus DATA, gathering information
 Time Perspective Immediate moment

This level of learning is not addressed in the *Learning and Performance Individual Survey*®. The survey is designed to apply to people who are in work settings. The percentage of population who would function only at the DATA level would generally not be found in normal work situations.

PROCEDURAL

Level of Learning INFORMATION, action without reflection
Performance Focus PROCEDURAL, doing things the most efficient way
 Time Perspective Very short (present - now)

If your results were high in the PROCEDURAL level of learning and performance, you bring the gift of linear logic and attention to detail into your work situation. You would generally be an excellent coach or guide for people who need to develop or learn a very precise series of steps to accomplish a task. You help clarify and define the most efficient way to accomplish a task, and make a great contribution to quality and consistency.

You are probably very punctual and organized in managing your time. You like to work step-by-step and zero in on the one right way to do something. Your attention to detail and need for precision and order can sometimes feel tedious to your co-workers if they feel it is slowing them down or is actually impeding spontaneity. You might judge others as careless, sloppy or wasting time when they are attending to some of the tasks of the other levels.

TIPS: Don't expect others to work through all the details with you. Appreciate that the more abstract work that others do, and the constant changes they bring, are important for staying current and competitive in a fast-moving world.

FUNCTIONAL

Level of Learning KNOWLEDGE, self-consciousness, reflection

Performance Focus FUNCTIONAL, doing something the best way

Time Perspective Short (immediate past & present)

If you have talent at the FUNCTIONAL level, you have a passion for the engineering aspects of your work. You would enjoy mapping and managing a project or process, using tools such as flowcharts, control charts, PERT charts, and project management software. You like to prepare for contingencies and always attend to backup plans and copies.

Your work area and calendar are no doubt well-organized, so you communicate your activities and plans well to other people. You enthusiastically support plans that have been carefully thought through. You make decisions based on good solid data and information. Your love of analysis can frustrate your co-workers if it prematurely pulls them into details when they are still exploring possibilities. However, you are probably one of the first people they turn to when they actually want something done.

TIPS: Look to more PROCEDURAL people to help you flesh out the details of your analysis. Appreciate that the MANAGING and INTEGRATING levels are helping ensure that the processes you design and manage so well, are working well with the other parts of the system.

MANAGING

Level of Learning MEANING, seeing patterns, trends, relationships

Performance Focus MANAGING, understanding what promotes or impedes effectiveness

Time Perspective Medium - long (historic past, present, very near future)

With natural talent at the MANAGING level, you are a “manager of meaning.” Context is very important to you — you want the whole story. You are good at asking the kinds of questions that will uncover the full situation: past, present and anticipated. You want to know everything that is happening and what everybody is doing. When asked a question you very well may respond, “it depends,” because you are constantly weighing and considering multiple alternatives to determine what is appropriate for this situation.

You are well-organized, but also have flexibility, especially when accommodating another person. You like to facilitate the building of relationships and group cohesiveness. You enjoy project management, tracking resources, establishing realistic goals and objectives, and helping people define their roles and responsibilities. You have a quick grasp of planning processes and quality tools that show patterns and trends. Others may view you as a hard task mistress or feel that you micro-manage with all your questions, when you are really just curious about what they are doing.

TIPS: Balance your need to know and control with trust that other people also need room to work the best way for them. You may need to accommodate some inefficiencies to allow people their comfort zones.

INTEGRATING

Level of Learning PHILOSOPHY/SYSTEMS, self-organizing systems
 Performance Focus *INTEGRATING, seeing where an activity fits the whole picture*
 Time Perspective Long-term (past, present & future)

The INTEGRATING person is a systems thinker and loves to explore interconnections and dynamic relationships. With a long-term time perspective, you are an intuitive strategic thinker and enjoy doing complex planning. You explore possibilities as a divergent thinker who can turn one idea into twenty at the drop of a hat. You would enjoy complex mapping processes such as systems dynamics or using quality tools such as inter-relationship diagrams, affinity diagrams or story boards. You like to know the thinking behind the doing, and are comfortable in the abstract realm of ideas and conceptual thinking. You see the big-picture and want to know where things fit the whole.

You probably have a dynamic, fluid, polychronic sense of time and may be casual about keeping time commitments. Along with this, however, comes an ability to juggle many things at once. Others may view you as “flighty” because you seem to always flit from one idea or project to another. They may perceive you as more interested in coming up with ideas than in doing detailed, focused work to make things happen.

TIPS: You will have difficulty communicating your ideas and getting the support you need without fleshing ideas out in more detail. Give people more tangible and concrete ways to understand what you suggest. It is easier for you to build the bridges they need than for them to somehow leap into understanding what you are saying.

RENEWING

Level of Learning WISDOM, intentionality, values, purpose
 Performance Focus *RENEWING, finding or reconnecting with one’s purpose*
 Time Perspective Very long-term (Very distant past to far distant future)

People who “score” high at the RENEWING level are those whose own need for clarity around values and purpose also helps others to get clear. You have a strong sense of the larger community and are probably passionate about issues like community involvement and environmental responsibility. You tend to be open-minded and embrace diversity and variety, both in people and tasks.

You enjoy open-ended explorations and creative processes. You like to do what attracts you at the moment, and are impatient with rigid structures or predetermined ways of doing things. You would enjoy group work around values, vision, and developing mission statements or very long-term strategy and scenario building. You probably have a strong sense of play and might introduce the offbeat, or play devil’s advocate to get people thinking.

RENEWING people are generally liked as people. You may appear irresponsible, however, because you really do not care about details and may lose patience with tasks before they are

completed. Once you are really clear on the purpose and feel that you can support the work, you are energized to work very efficiently.

TIPS: Appreciate that others have much higher needs for order, structure, time organization and completion. You will need to support them in the way you organize and complete your tasks. Your open-ended explorations may feel like a waste of time to some people. Ask if they would like to explore with you before you begin.

UNION

Level of Learning UNION, synergy

Performance Focus UNION, understanding values in greater context

Time Perspective Inter-generational, timeless

The UNION level of learning and performance is not specifically addressed in the *Learning and Performance Individual Survey*[®]. If, however, your results were extremely high on the RENEWING level of learning and performance, it well may be that you have a very strong connection with the UNION perspective.

If the values you hold resonate in particular with the global community, and the earth itself, it would indicate that your value system is more UNION-based, rather than strictly community-based. If your comfort zone includes the UNION level, you would appreciate processes that connect people's purpose to the health and well-being of the larger cosmos. In teams or organizations, this level of performance is expressed through environmental and global community activism.