

Implementing a Successful KM Programme

By Stan Garfield



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Preface

In 1996 I was asked by the senior vice president of my business unit to start a knowledge management programme after we visited Ernst & Young's Center for Business Knowledge in Cleveland, Ohio. When he heard that Ernst & Young had a chief knowledge officer, he turned to me and said, "I want you to be our CKO". This made it sound simple, but it turned out that a lot of time and effort was needed to get our KM programme off the ground.

Along the way, I had to endure many ups and downs, enlist allies in the cause to join my virtual team, get executive sponsorship from a succession of leaders, increase investment and commitment to the programme, deal with constant organisational change, adjust to changing technology, migrate from and integrate with legacy software, exercise diplomacy with many other groups, and cope with two large-scale corporate mergers.

Much of knowledge management has stayed the same during the past ten years. The fundamental goals have not changed (see Chapter 2 for a list of 15), the challenges are much the same, and the basic categories of people, process, and technology still apply. What has changed is the technology, the acceptance of KM as a strategic initiative, and the willingness of organisations to assign people to the roles of knowledge manager and knowledge assistant.

We still struggle to get people to spend time sharing and reusing knowledge, it can still be hard to find information at the time of need, and expense budgets are still tight. But there are more people practicing KM today, there are more ways for practitioners to share their thinking (e.g.,

blogs), and there are building blocks (e.g., communities, team spaces, taxonomies) that are now in widespread use. Emerging tools and techniques (e.g., wikis, social network analysis, tagging) are being tried and tested in KM programmes to better address existing requirements and to enable new capabilities.

The future challenges for knowledge management include creating new knowledge to stimulate innovation, expanding and better exploiting people networks, incorporating narrative in all knowledge initiatives, and making it easier to find information when it is needed for better decision-making. Knowledge management is here to stay, and by applying its fundamental concepts of learning from the past, reusing good ideas, and avoiding past mistakes, KM practitioners can ensure that their initiatives will succeed.

Chapter 1: Introduction

What is knowledge management?

Knowledge management (KM) is “the art of transforming information and intellectual assets into enduring value for an organisation’s clients and its people” (from Ellen Knapp, former chief knowledge officer of Pricewaterhouse Coopers). Knowledge management fosters the reuse of intellectual capital, enables better decision-making, and creates the conditions for innovation. This is achieved by providing people, processes, and technology to help knowledge flow so that people can act more efficiently, effectively, and creatively. For a discussion on this topic, see “Defining Knowledge Management” by Steve Barth at <http://www.destinationkm.com/articles/default.asp?ArticleID=949>.

Why should we spend any time trying to manage knowledge? We are all busy enough as it is without adding the burdens of searching for and contributing knowledge.

If we don’t spend time on knowledge management activities, we run the risk of wasting even more time on unnecessary effort that could have been avoided. We might repeat mistakes that others have already made, costing time, money, and even lives. And the results of our work will not be as valuable as they could have been if they had been influenced by the experience and expertise of others.

Here are five key KM activities and the associated benefits.

Learn by doing, from others, and from existing information so you can perform better, solve and avoid problems, and make good decisions. Learning is the origin of knowledge.

Share what you have learnt, created, and proved to allow others to learn from your experience and reuse what you have already done. This provides a supply of knowledge.

Reuse what others have already learnt, created, and proved to save time and money, minimise risk, and be more effective. This creates demand for knowledge.

Collaborate with others to yield better results, benefit from diverse perspectives, and tap the experience and expertise of many other people. This allows knowledge to flow at the time of need, creates communities, and takes advantage of the strength in numbers.

Innovate to be more creative, inventive, and imaginative, resulting in breakthroughs from bold new ways of thinking and doing. This creates new knowledge.

Reasons for starting a KM programme

Why do you plan to undertake a KM initiative? Here are some typical reasons.

An outside consultant advised management to start formally sharing knowledge, form communities of practice, or some other initiative which is in vogue. Management has decided to take this advice and assigns you to get it started. You are told to work with the consultant as the internal programme manager.

A senior manager heard or read about knowledge management and thinks your organisation should be doing it. You are given the task of investigating it further.

Your organisation has some knowledge-sharing processes or tools and wants to coordinate them into a coherent programme. You are asked to take the lead.

Your competitors are known for their KM efforts, and you need to keep up with them. You are told to come up with a KM initiative as good or better than the competition.

Members of your organisation have complained that it is difficult to learn from others, share what they know, find content to reuse, collaborate with colleagues, or innovate and invent. You take on the challenge of addressing these concerns.

Learning about the field

Before starting a KM initiative, you should learn more about the field. To start, read books, periodicals, websites, and blogs; attend training and conferences; and participate in professional communities to deepen your understanding of the field of knowledge management. This is practicing what you preach, and will allow you to learn from the experience of others, reuse the best ideas, and avoid the usual pitfalls.

The Appendix lists 25 books to read; ten periodicals to which you can subscribe; ten websites to visit; details on five aggregators, eight periodicals, six websites, and 60 blogs which offer RSS feeds; 25 conferences you can attend, ten sources of training, 52 of the leading KM consultants and authors, and 42 KM communities, discussion lists, and groups which you can join.

It's a good idea to attend a KM conference before starting a KM programme. After that, try to attend one every year, choosing a different one as much as possible. Many conferences feature training before, during, or after the event. Take advantage of this whenever possible.

When attending conferences and training courses, make every effort to get to know the other attendees. Seek them out during meals, breaks, and social events. Ask them questions, share your thoughts, and exchange contact information. Try to schedule visits with the most energetic colleagues to learn more about their KM programmes.

If you have the funds to engage an outside consultant, you can benefit from their knowledge and experience. If not, you can still learn from visiting their websites and reading their literature and publications. For KM communities, discussion lists, and groups, start by reading any discussions, and then post questions. If events are held, try to attend, especially face-to-face events.

Getting started:

Recommended resources

Book: Working Knowledge by Thomas

Davenport and Laurence Prusak <http://www.amazon.com/gp/product/1578513014/>

Periodical: Ark Group *Inside Knowledge* <http://www.ikmagazine.com/currentissue.asp>

Website: Gurteen Knowledge Website <http://www.gurteen.com/gurteen/gurteen.nsf/>

Blog: Anecdote <http://www.anecdote.com.au/>
Conference: KMWorld & Intranets <http://www.kmworld.com/kmw06/>

Training: APQC <http://www.apqc.org/portal/apqc/site/?path=/services/professionaldevelopment/index.html>

Expert: Steve Denning <http://www.stevedenning.com/>

Community: actKM Discussion List http://actkm.org/mailman/listinfo/actkm_actkm.org

Learning about the field of KM is an ongoing responsibility. There is a great amount of content to digest, and new material is published every day. Start with a simple goal such as reading one book or

attending one conference, accomplish it, and then set your next goal. As you learn more, it will become easier to tackle each successive step.

The priorities for implementing a KM programme

Here are the Top Ten Priorities for setting up a KM programme.

Put a strong KM leader in place, and ensure that the KM team has only strong members. Your KM programme will only be as strong as the people leading it. Make sure that you appoint leaders who are respected in the organisation, are flexible and adaptable, are dynamic and assertive, are eager to be of help to users, and who have strong communication and project management skills. Avoid people who are available because they have no current role, who project negative attitudes, or who don't work collaboratively. KM teams are usually small, and having one weak link in a small team can cause the KM programme to fail. Choose team members carefully, and recruit only the very best people.

Balance people, process, and technology components, with a project leader for each category.

Don't let any one category dominate the other two. A typical challenge is to avoid immediately diving into choosing and implementing technology. Technology is important, but it must support people and processes, not be an end in itself. Assign project leaders for each category who are acknowledged experts in that area, who have successfully led other projects, and who work well together. They can serve as advocates for their categories, but should recognise and support the importance of the other categories.

Establish a governance and collaboration process to engage all groups within the organisation (e.g., business units, regions, functions), and to formally manage and communicate on all projects – appoint KM leaders in each major group.

By engaging all constituent groups in your organisation, you will ensure that the KM programme is not isolated from its users. Employees should view KM as something for which everyone is responsible, not just the domain of the KM team. KM leaders from each group should continue to directly report to their current groups, but become part of a virtual KM team. Ideally, they should feel equally devoted to their home groups and to the virtual KM team.

The KM leaders have a very important two-way role. They represent the needs of their groups to the KM team, and they communicate the direction of the KM programme to their groups. They are champions of their groups to the KM team, and they are champions of KM to their groups.

The central KM staff should view the virtual KM team as the decision-making body. It is very important to keep all members informed on current developments and future plans. Avoid an "us versus them" mentality at all costs.

Hold annual worldwide face-to-face meetings to get all KM leaders informed, energised, and collaborating.

Although it is usually challenging to get approval for large meetings involving significant travel costs, it is nonetheless critical to do so. As soon as you have appointed a critical mass of KM leaders, start planning your first meeting. Of course, you are not meeting for the sake of meeting. You need to meet in person in order to establish trust between

team members; communicate the vision, mission, expectations, roles, and plans; solicit feedback and inputs; and provide the environment for team members to collaborate.

Plan the meeting carefully. Avoid an endless parade of talking heads and boring presentations. Instead, include workshops, birds-of-a-feather sessions, interactive discussions, and storytelling. Build in plenty of time for small group meetings, networking, and conversations. Invite the senior executive sponsor to attend all or part of the meeting to present, answer questions, and mingle with the attendees. Invite an outside speaker on an important topic. Give all participants a book and ask them to read it and discuss it in a threaded discussion after they return from the meeting.

By the end of the meeting, everyone should know the direction they should take, believe that their voices were heard, and feel motivated to charge ahead. They will be more effective in collaborating electronically with one another over the course of the next year. And they will be able to visualise the faces of their peers when talking to them on the phone.

Communicate regularly through newsletters, training, websites, and local events.

Publishing the implementation plan is just the start of the requirement to communicate on an ongoing basis. Develop a schedule of regular newsletters, training courses, and events. Create websites and be sure to keep them updated regularly. Regularly solicit success stories and publish them in multiple places. Send KM metrics reports to the senior leadership team and ask that all groups publish their own variations. Make it easy for users to ask questions, and publish the answers for all to see.

Get the senior executive to actively support the programme.

You need to gain the approval and ongoing leadership of the senior executive for the KM programme. After securing sponsorship, regularly follow up to ensure that the all commitments are kept. See Chapter 5 for details on obtaining and enforcing the Ten Commitments.

Engage with other KM programmes, both internal and external, to learn, share ideas, and practice what you preach.

Learning about the field of KM is not a one-time only action. Rather, it is an ongoing requirement to ensure that you take advantage of what others in your field have already learned, succeeded with, and failed with. If there are other KM programmes within your organisation, contact their leaders to find out the details of their efforts. If there is an internal KM community, join it and actively participate. If no such community exists, talk to your peers about creating one, and take the lead if necessary in getting one off the ground.

Subscribe to at least one KM periodical. Use an RSS feed reader or personal home page such as My Yahoo! to follow leading KM blogs. Attend at least one conference or training class each year. Join an online KM community and participate in its discussions and calls. Join a local KM community to meet in person, and create one if not already available in your location. For suggestions on communities to join and blogs and news to subscribe to, see the Appendix.

Focus on delivering tangible business benefits that match the overall objectives of the organisation.

The KM programme only exists to produce useful results for your business. Keep

reminding all KM leaders and participants of this. When publishing success stories, be sure to mention the business impact. When communicating, tie all proposed plans to the expected benefits.

Deliver regular improvements to make the KM environment effective and easy to use. Once the selected people, process, and technology components are in use and achieving results, figure out how to improve them and add to them to yield even more value. User surveys, KM team meetings, external reading and conferences, and your own inspiration are all excellent sources of ideas for enhancements and new capabilities.

When you get a good idea, present it to your KM team, and if they like it, quickly prototype it. If the prototype is successful, proceed to a pilot so you can make improvements, learn from experience, and plan a full roll-out.

Set three basic goals for employees and stick to them for at least a year.

Avoid establishing a long list of arcane metrics. Instead, pick three simple goals which are easy to articulate, implement, and measure. Make these three goals the pillars of your ongoing communications so that everyone will remember them. Set overall targets for the organisation, and key all metric reports to show progress against these goals.

Here are three sets of examples to show the kinds of goals you can establish.

Software company

- Learn by posting questions in a community of practice.
- Share by publishing white papers, submitting software code to a repository, or documenting proven practices.

- Collaborate by using a team space as part of a project team.

Research and development firm

- Learn by searching for previous projects similar to new ones and contacting the project teams for their advice.
- Collaborate by answering questions in a community of practice or ask the expert programme.
- Innovate by submitting a patent application.

Consulting firm

- Share by submitting a lessons learnt document to a repository for each project.
- Reuse documents, code modules, or methodologies on new projects.
- Learn, share, reuse, collaborate, and innovate by actively participating in a community of practice.

In summary, here are the three keys to the success of a KM programme.

1. **Set three simple goals and stick with them for the long term.** Communicate them regularly. Incorporate the goals and metrics into as many parts of the organisation as possible (e.g., employee goals, incentive and rewards programmes, and newsletters).
2. **Keep the people, process, and technology components of the KM programme in balance.** Don't allow one element (e.g., technology) to dominate the other two.
3. **Lead by example.** Model the collaboration and knowledge sharing behaviours you want the organisation to adopt in how you run the KM programme.

Key pitfalls to avoid

In addition to spelling out the keys to success, it is also important to warn about the common traps into which KM practitioners fall. Avoid the following pitfalls.

Trying to take on too much

There are at least 50 different people, process, and technology components available for implementation. Avoid the temptation to try all of them, and instead, keep focused on choosing the few which will yield the greatest benefits in the short term to your organisation. Watch out for the allure of the latest technology, the current fad, or the tool which sounds too good to be true. Stick with proven approaches, even if they seem boring and predictable.

Focusing on technology

It is common for KM initiatives to immediately be drawn to technical solutions, including tools, systems, and databases. These can help make a programme succeed, but they should always be in support of a people or process component.

Implementing portals, repositories, search engines, and other tools will not automatically address how content is provided, whether or not people use the tools, or how the use of the tools yields beneficial results. Communities are groups of people, not portals or bulletin boards. Knowledge is shared and reused by people following processes, not by systems. Some members of the KM team will still fixate on the design of repositories, collecting documents, and reporting on minutiae such as uploads and downloads. Keep reminding them that connection is just as important as collection.

Not engaging the constituents

Any new initiative will fail if it does not meet the needs of its intended audience or

is perceived as being created in isolation.

To prevent this from happening, treat your users as customers whom you are trying to acquire, satisfy, and keep.

Use virtual teams and communities to continuously solicit, capture, and respond to the needs of the people in your organisation. Establish ongoing methods for two-way communications. Conduct surveys, publish newsletters, and maintain websites. And above all, listen to what your constituents tell you, and take timely action in response.

Doing too much studying and planning and not enough prototyping and piloting

It's necessary to study and plan before starting a new initiative, as discussed in this and subsequent chapters. However, there is a time to declare success for your planning efforts and move on. For example, after conducting a survey of existing tools, you may not need to conduct another one. And if you conduct monthly employee satisfaction surveys for a year and find that the results are not varying, you can probably stop doing them.

Prototyping and piloting allow you to test out new ideas, gain experience, and make iterative refinements. You can quickly learn that an assumption was wrong and modify your direction. Instead of planning for a new version of a tool or a website for six months, try making small incremental improvements each week. Users will benefit immediately from the changes, and they will perceive your team as being dynamic and responsive instead of slow and plodding.

Not reusing what others have already learnt and implemented

Knowledge management has been around for over ten years. A lot has been learnt during this time, and you can benefit from

this fact. Reusing the ideas and experiences of others is what you are asking others to do in the KM initiative. You should model this behaviour by applying it yourself. By learning, sharing, reusing, collaborating, and innovating with other KM professionals, you will show your organisation how it is supposed to be done, and in the process, accelerate implementation and ensure success.

Five steps to follow

There is a series of five steps to follow to start a knowledge management programme. Subsequent chapters provide details on each step.

1. Create a **Top Three Objectives List** of challenges and opportunities which your KM programme will address. These objectives align business direction with programme goals.
2. Provide **Nine Answers** to questions about people, process, and technology. This information defines who will participate, which processes will be required, and how tools will support the people and processes.
3. Define the **KM Strategy**. These are specific actions which will be taken to implement the programme.
4. Gain the sponsorship of your senior executive through the **Ten Commitments**. These commitments from the leader of your organisation will enable the KM strategy to be implemented.
5. Create and execute the **Implementation Plan**. This plan spells out the details of implementing the initiative. Contained in the Implementation Plan are programme governance; desired modes of knowledge flow; people, process, and technology component

selection; and implementation plans for some of the components, such as training, communications, and change management. Each one of these needs to be followed as part of implementing the overall plan.

Summary

Knowledge management enables learning, sharing, reusing, collaborating, and innovating to help an organisation meet its objectives. By following the steps recommended in the following chapters, you will be able to plan, implement, and manage a KM programme to help your organisation succeed.