

Knowledge Management Consulting Method

Part 4 – KM Development Plan

Module 4.6 – Integrate the KM Architecture

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Introduction

An Overview of the KM Consulting Methodology

The KM Consultancy Methodology enables structured thinking and planning for a knowledge management project. The KM Consultancy Methodology is designed to be modular so that an organisation can choose to start at different levels depending on its readiness, needs and requirements.

The KM Consultancy Methodology is divided into 6 parts of learning and activity. Part 1 concentrates on KM Education, understanding what KM is, the terminology used and why it is important. Part 2 introduces the individual to the importance of KM frameworks, and more importantly, the framework used for the KM Consulting Methodology.

Parts 3, 4 and 5 focuses on the planning, developing and implementing KM within and organisation. This involves looking at the initial or the planning stage of the strategic planning for knowledge management, in Part 3. Part 4 looks at developing the knowledge organisation, looking at how to KM enable the organisation and the need to iteratively develop the KM initiative. Part 5 looks at implementing the KM initiative, from a small pilot project, to a organisation wide KM roll-out and then to an inter-organisation wide KM roll out.

Part 6 focuses on the knowledge and skills required to successfully conduct KM on a daily basis. This involves fundamental skills, such as utilising the KM system and working effectively as virtual teams through to understanding the new roles and responsibilities of the Chief Knowledge Officer, Knowledge Manager, Knowledge Administrator and the Knowledge Workers.

Part 7 introduces the 9 steps of the KM Process. The KM process enables organisations to introduce, implement and assess how an organisation can become KM enabled. This part will introduce the 9 Steps and describe their purpose and importance. A KM Maturity Model is introduced to allow users to start assessing how effectively they are KM enabling their organisation/process/project.

Part 4 - Develop the KM Organisation

Part 4 of KM Consulting Method concentrates on developing the KM organisation. There are six different modules as follows:

- Modules 4.1 are an audit-leverage pair that focuses on business processes.
- Modules 4.2 are an audit- leverage pair that focuses on organisational structures and networks of people.
- Modules 4.3 are an audit- leverage pair that focuses on technology issues.
- Module 4.4 focuses on the development of the underlying model for knowledge asset organisation and is essential for the customisation of KM System tool, such as Knowledger.
- Module 4.5 focuses on the knowledge assets measurements
- Module 4.6 is a module that synthesises and documents the changes that the organisation is implementing as a result of the knowledge management initiative.

The purpose of this Part 4 is that it is iterative in nature, where an organisation will constantly analyse and leverage the knowledge for continuous further improvements. Modules can run in parallel and can be repeated several times throughout the knowledge management initiative. Three simple steps underlie the proposed iterative approach. First, diagnose the most critical problems and opportunities facing the organisation with respect to knowledge management and sketch out a possible solution. Second, quickly, over a few months, translate the sketch of a solution into new work processes and systems; include new ways of working as well as new computer systems, and begin using both for real. If, for example, the problem at hand is customer knowledge management, use the new process to manage some important customers at several offices (or business areas). Given this real-world experience, determine where these new processes and systems succeed or fail, and quickly fix the failures. In other words: do it, then fix it. Third, scale up systems for rollout across the whole organization. Communicate the proven success of the trials in order to build momentum for change.

The essence of the iterative prototyping approach is rapid learning from doing. Speed ensures that change is always relevant, it forces trade-offs so that limited resources are devoted to pursuing goals of real value, it allows top people to participate in change, and it builds unstoppable momentum. Trying out new ideas in the real world allows their shortcomings to be rooted out by the harshest of tests - real-world experience - and their successes to be proven beyond challenge from the most cynical critics. By stressing speed of change and using the real world as a laboratory to learn from, the iterative prototyping approach makes change and improvement a constant fact of corporate life.

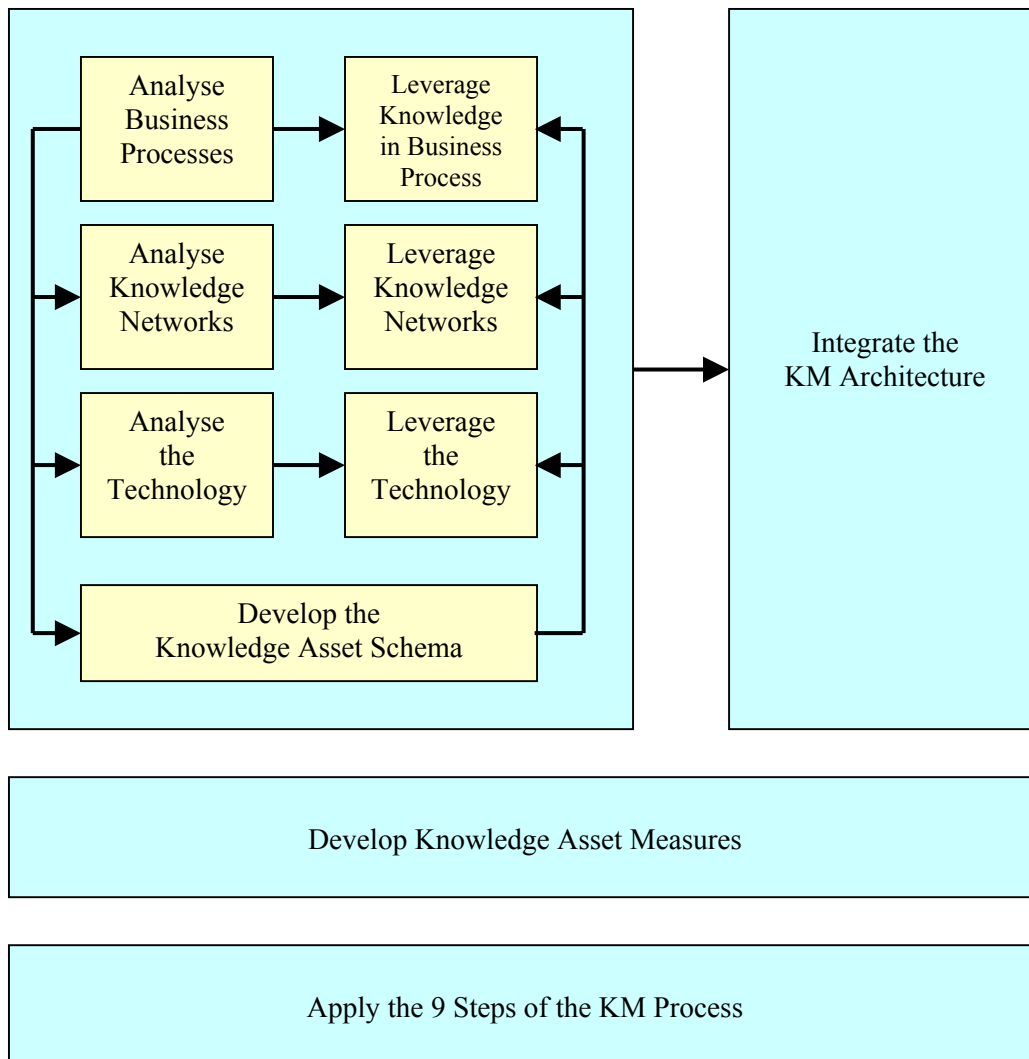


Figure 1 – Develop the KM Organisation

Summary of Activities per Module

Module		What is it used for?	Who is involved?	What are its prerequisites?	Comment
4.1	Analyse Business Processes	This module helps you audit the knowledge requirements of business processes.	Consultant and employee that 'governs' BUSINESS process. Additional interviews with employees involved in process.	High-level identification of key knowledge assets and key business areas of the organisation.	This module is useful: in relatively structured environments when there is a need to better manage knowledge in specific business processes
	Leverage Knowledge in Business Processes	To design and implement additions / modifications in business processes to improve knowledge management within process	Consultant and employee that 'governs' business process. Additional interviews with employees involved in process.	An analysis of the existing process; Knowledge Asset Schema	
4.2	Analyse Knowledge Networks	This part of the module helps you understand the informal flow of knowledge within networks of people in the organisation.	Consultant and Change Agent. Additional interviews with people in knowledge networks.	High-level identification of key knowledge assets and key business areas of the organisation.	This module is to be used only in environments that there already exist informal networks of people that focus on a specific knowledge asset or business area
	Leverage Knowledge Networks	This part of the module helps you design and moderate Knowledge Networks within the organisation.	Consultant and Change Agent. Additional interviews with people in knowledge networks.	Knowledge Asset Schema	This module is used by organisations that wish to build communities that will be collecting, storing and advancing key knowledge assets of the organisation. Particularly important for dispersed organisations.

Module		What is it used for?	Who is involved?	What are its prerequisites?	Comment
4.3	Analyse the technology	Asses the current state of IT in the organisation and identify existing information sources	Consultant, Change Agent, CIO, IT director or similar		This module supports the integration with existing enterprise systems.
	Leverage the technology	Present the technology element in knowledge management	Consultant, Change Agent, CIO, IT director or similar	Ideally Modules 4.2 and 4.3	
4.4	Develop the Knowledge Asset Schema	Design the knowledge asset schema, knowledge objects and attributes, and ontology	Consultant with Change Agent		This module provides essential input for the design of the knowledge repository.
4.5	Develop the knowledge asset Measures	To measure, track and report on the organisations knowledge assets	Consultant with Change Agent	Knowledge Asset schema	This module is essential for knowledge accounting
4.6	Implement the KM architecture	Helps integrate people, process and technology changes into one holistic solution	Consultant with Change Agent		Practical tips on integrating the people, process and technology changes. Addresses cultural issues.
4.7	Applying the 9 Steps of the KM Process	To KM enable the organisation/process/project. To monitor and measure the progress of KM enabling your organisation.	Consultant with Change Agent	A clearly defined area to be KM enabled	This module supports integration of the KM process within an organisation.

Module 4.6 - Integrate the KM Architecture

1.0 Purpose of module

- To summarise the new systems, organisational structures and processes that implement the knowledge organisation.
- To provide practical guidelines for the implementation of the KM architecture.

2.0 Where to start from

The knowledge architecture identifies the scope of the investment that is made in managing knowledge. More than a technical solution, it encompasses these components:

- People
- Processes
- Technology

This module brings together these elements in to a working relationship. Here we provide tips for putting people, processes and technology in place to support the management of knowledge.

3.0 People

3.1 New organisational roles

To support a true enterprise-wide knowledge architecture, you will need to invent new positions and an operation that can direct the cultural change and help the organisation adapt to as new knowledge structure. In this section, we detail the positions and attendant job descriptions you may draw on when assembling the knowledge architecture. You can use them as they are, or modify them to fit the specific situation and budget. At minimum, you will need people to fill these roles. This may not necessarily involve going out and hiring a whole new set of employees. In many cases you can ‘re-purpose’ existing job functions to do the tasks required.

The effort to build a knowledge architecture will be undertaken differently by different-sized organisations. A large, enterprise initiative demands dedicated personnel; smaller companies might opt to fold the responsibilities described below into existing job functions. Many existing roles, such as competitive intelligence professionals, Web developers, human resource professionals, may already have the necessary skills presented here. Over time, however, increasing demands placed on these people will make the part-time approach somewhat untenable.

Knowledge Manager

One of the basic tenets of knowledge management is that knowledge needs to be managed with the same responsibility as any other corporate asset. It therefore needs managers that will be responsible for instigating, implementing and monitoring knowledge-management initiatives at different levels. For most knowledge managers, this is usually only a part of their job specification. Their main task will be to improve the operational effectiveness of the organisation in a specific area - knowledge management is simply the way forward. However, the knowledge manager must show a passionate commitment to knowledge sharing and creation. Each knowledge-management project is a stepping-stone in a process of developing a new form of corporate culture. Effective though each step needs to be in its own right, developing a positive feedback loop that can spread knowledge-management initiatives wider is also important.

The ultimate goal should be to engage every employee in contributing to utilising the corporate memory. Knowledge sharing and knowledge creation will only improve if specific individuals take pivotal roles in promoting knowledge-management goals and implementing knowledge-management projects.

The plethora of new job titles that knowledge management is promoting is one sign of its effect on corporate organisations. The danger is that creating new titles will be seen as sufficient in itself to induce a change in corporate culture. Similarly, if knowledge management is 'passed off' as an issue for the chief knowledge officer or for a knowledge manager, then it is unlikely to have a significant impact on the main activities of the company. The individuals with an explicit role are only facilitators to help the company as a whole to understand the importance of knowledge management - it is this task which is the most important of all.

Chief Knowledge Officer

The appointment of a chief knowledge officer (CKO) is the most visible sign of a company's commitment to better knowledge management. It recognises the need for a strategic view of knowledge use within the organisation that is not tied to information systems alone. It should also ensure the knowledge-management initiatives have board-level backing.

The role of the CKO is to:

- Provide a high-level, strategic view of the importance of knowledge management to the company's business goals.
- Promote knowledge management throughout the organisation.
- Ensure that the necessary incentives and structures are in place to enable knowledge-management initiatives to flourish.
- Act as a conduit between the board and the rest of the company so that the goals of knowledge management are understood and shared across the organisation.
- Works closely with the CIO so that knowledge management requirements can be translated into effective information systems, and that the realities of IT are kept in mind when scoping knowledge management projects.
- Take responsibility for corporate initiatives, such as knowledge mapping" development of corporate vocabularies and taxonomies, and provide a knowledge management perspective on improvements to the corporate infrastructure
- Instigate and monitor measures and indicators of progress on knowledge management
- Manage the knowledge-management specialists within the organisation - providing training, ensuring co-operation and knowledge exchange between knowledge managers.

In some companies with a devolved management structure, an over-arching CKO role may not be appropriate. In this case, some of the responsibilities outlined above must fall to managers of specific initiatives or projects, but the high-level vision and commitment that is necessary, must be taken on by the CEO or other board member.

The CKO must combine an understanding of both the pragmatics of knowledge management and the business-critical knowledge value chains within the company. They must also have a good sense of organisational politics. As Thomas Davenport has written: 'if a knowledge-management initiative is not political, then it is probably not being taken seriously'.

Large, enterprise-wide knowledge management projects need managers who can combine a multitude of skills. They need to understand the basic business objectives of the project and be comfortable with the technologies available. They also need to understand the cultural and behavioural elements of knowledge management.

They will need normal project management skills in areas such as team building, budget and schedule control and managing customer requirements and involvement. In addition, they must be part IT expert, part psychologist or anthropologist, and have a strong belief in how improved knowledge sharing can contribute to the core goals of the business.

The corporate memory requires cultivation and - as with most forms of cultivation - weeding is both a necessary and manually intensive task for day-to-day management of an active repository of corporate knowledge, best done by individuals who understand the content. This is a crucial task that adds immeasurable value to the knowledge base at numerous levels, for example, ensuring that:

- Discussion groups remain relevant.
- New contributions are assessed for value.
- Unused or out-of date documents are archived.

This is not simply an administrative task - by raising the quality of the knowledge available, the subject manager encourages people to use and contribute to the system. By their actions, they make a knowledge repository a dynamic, growing resource.

Subject Managers

Subject managers are valued for their domain experience; their responsibilities for knowledge management will be a secondary – but an important role.

Subject managers are experts in content. Organisations also require experts in knowledge management processes. This role fills a gap between current expertise offered by IS departments, information specialists and domain experts in end-user departments.

Services that will be needed include:

- Explaining how technology can support specific knowledge management initiatives
- Supporting new knowledge-management projects during the initial phases
- Helping with compliance to corporate standards.

Information specialists that work closely with subject managers and have a good grasp of the overall information needs of the organisation will be in good position to provide this service.

Knowledge Brokers

Knowledge brokers will become increasingly important in organisations with several knowledge-management initiatives under way. While the subject managers may be expert in their own area, knowledge management will often need to span different areas - linking resources across corporate technological boundaries. The knowledge broker will be able to link users and suppliers of knowledge throughout organisation.

4.0 New culture

Knowledge management cannot be imposed from the top – but neither can it flourish unless it is driven and supported by senior management. Knowledge management must be backed by sufficient will, on the part of management, and receive sufficient acceptance by the employees.

Senior management's task is to create a climate that encourages knowledge sharing, in which employees can feel secure enough to make a full contribution to the evolution of the corporate knowledge base, and where such contributions are adequately recognised and encouraged.

Knowledge management can only be successful if the front-line employees concerned, buy into the values and goals. In order for this to be the case, they must feel that their contributions make a difference, and the best way to achieve this is to ensure that they see direct benefit – be it in terms of access to new information / knowledge themselves, financial rewards, or career progression.

The role of mediating between the high-level strategy of senior management and the day-to-day implementation of knowledge management practices on the front line falls to middle managers. Middle management must be willing to own knowledge management initiatives and encourage and support their staff in their effort to improve knowledge sharing.

The imperatives behind any knowledge management strategy are to:

- Build trust
- Encourage sharing
- Value innovation

Knowledge management initiatives will only succeed if an organisation is able to create a culture where these values are accepted as the norm.

The relationships of trust and reciprocity required for knowledge management are not a

by-product of a knowledge management initiative. Even more importantly, they cannot be delivered by technology. They must be cultivated as prerequisite of successful knowledge management.

A knowledge-sharing culture requires:

- Employees that feel secure – if there is no security then there will be little sharing of knowledge
- Suitable rewards – sharing knowledge and contributing to the knowledge value chain must be seen as a valued activity in terms of prestige, career progression or salary
- Enforcement – good knowledge management must be seen as more than an optional factor, employees should be clear that it is an essential part of their job and one on which their performance is measured
- Reciprocation – although carrots and sticks in the form of rewards and enforcement are an inescapable element of knowledge management, greater benefits will come from ensuring positive feedback from the initiatives themselves. A consultant that benefits from a best practices database is more likely to contribute to a knowledge management system than to one that fails to support their needs. Developing a positive feedback loop for those involved is the only way to ensure long-term viability
- Ownership – above all, the people involved in any knowledge management project must feel a sense of ownership. They must feel themselves to be stakeholders in the success of the project. This of course is more likely to happen if they already feel that they are stakeholders in the organisation.

5.0 Processes

Process improvement of process redesign involves the reconstruction of people processes as well as technical ones. Module 4.1 provides a technical structure, however, it does not define an approach for managing change. Expertise in soft methodologies, such as organisational design and development, are required to supplement the implementation process. In fact, since knowledge management is more a people rather than a process issue, experience suggests that many of the failures associated with knowledge processes are attributed to the lack of interest in the human and cultural aspects of implementation.

The people section of this module provides some insight on the cultural issues that should be taken into consideration when implementing knowledge management projects; they are also applicable in the case of improving or redesigning business processes. Changing a business process invariably changes the patterns of social interactions and thus changes the inherent meaning carried out by the process. It is a mistake to think that changing the processes will change the culture or the mentality of

the organisation, and since a knowledge management project is not a full-blown re-engineering project, it is advisable to work your solution around the existing people's cultures. In practice this translates to guiding principle that focuses on: *taking effort to design processes that work with not against the people's own personal preferences, values, and culture*. In planning the implementation of the process change, it is not enough to develop rational, logical plans. One must anticipate the illogical and irrational needs that will occur. Orientation of every employee towards the company's KM mission must be an early objective, especially for those employees that are going to be in charge of critical knowledge leveraging steps within critical business processes.

The project approach

Another aspect of a process redesign project is the actual implementation of the redesigned process. Depending on the scale of the changes and the scope of the project within the organisation (group, department or organisational-wide project), approaches with varying degree of complexity and sophistication can be utilised. In all cases however it would be considered practical to split the project up into manageable and controllable stages. This approach has benefits that include: setting priorities; every project is managed in a stable situation where direction of the process can be reviewed; and the costs and benefits are controllable.

6.0 Technology

The technology element in knowledge management need to seamlessly support the work of all organisational roles involved. This includes the work of knowledge workers, knowledge managers, as well as administrators of the KM systems.

The following example of a KM system, which is specifically designed with these types of users in mind, is Knowledger (Knowledge Associates KM System). Knowledger allows access to different portals on one KM system. Each portal is targeted towards the needs of different knowledge working needs, as follows:

- From a knowledge professional/knowledge workers perspective, in his/her day-to-day work, a very simple to use, pragmatic and highly practical Navigator is sought here. We have called this the 'Knowledge Worker Navigator' (KWN).
- From a KM Systems Administrators point of view, Knowledger provides the 'Administrators Knowledge Navigator' (SAKN).
- From a Chief Knowledge Officers (CKO) perspective, or Director of Knowledge Management, and/or a KM Consultants point of view, the KM Holistic Framework is highly relevant, and therefore it is has been used in the tool as part of a 'Strategic

Knowledge Navigator' (SKN). The SKN also provides the design framework and potential for integrating key aspects of the Method (Stages 1 & 2) directly into the Tool.

For a busy knowledge worker it is an absolute requirement for any KM system to be well integrated within his/her desktop. This important requirement has been addressed by the fact, that most KM systems today (including Knowledger), use a Web-interface allowing for easy access, even from a remote computer.

Integration with existing information sources (internal and external to the organisation) is also required. This is a highly organisation-specific task that needs to be addressed by the consulting team. Module 4.3 (Analyse and leverage the technology) provides a systematic way to audit the existing systems and information sources of the organisation from a knowledge management perspective.

Glossary

Knowledge The ideas or understandings, which an entity possesses that are used to take effective action to achieve the entity's goals.

Knowledge management The ways to create, retain, share, account for, and leverage knowledge - at all levels, from the personal level to the team level, the organisational level, the inter-organisational level, and the global level.

Knowledge Asset A resource that an organisation wants to cultivate and manage. Human assets are people and networks of people, structural asset could be an automated sales process and market asset could be a corporate brand.

Business case A document describing the business issues driving the project, the project objectives, the project scope, the approach and time frame for achieving results, the budget and the project team.

Critical Success Factors The most important activities and processes the organisation has to make right to reach the goals outlined in the strategy. Examples include: product development, inventory reduction, time to market, customer service and so on.

Vision The dream of a future state for the organisation.

Change Agent The person responsible for the process of change and incorporating the principles and tools of change management into an organised and systematic plan of implementation.