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PLANT the Right Seeds to GROW a Harvest of Knowledge:

Practices that worked and lessons learned from KM Initiatives that have added value to business operations and performance

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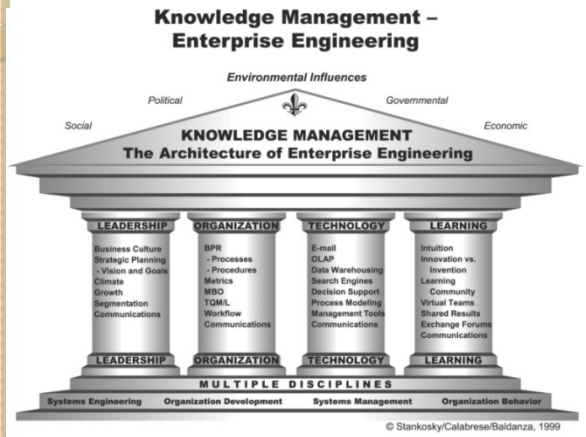
Lessons Learned (Practice, Theory, Experience & Research



Source: Adapted from Baldanza and Stankosky (2000)

- Leadership –deals with the environmental, strategic, and enterprise-level decision-making processes.
- Organization–deals with the operational aspects of knowledge assets.
- Learning–deals with organizational behavioral aspects and social engineering.
- Technology–deals with the various information technologies that support and/or enable KM strategies and operations

Source: Stankosky (2005)

Lessons Learned: Leadership

- Be intentional about planning
- Know the knowledge you need to capture and manage
- Know from the beginning your expected outcomes
- Know how your expected outcomes are to be measured – define the value sources
- Identify roles and responsibilities
- Establish a steering committee
- Involve leadership early in resolution
- Monitor and manage the KM Strategic Plan

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Lessons Learned: Organization

- Establish KM processes and procedures up front
- Start with a pilot
- Take an incremental approach
- Establish partnerships (IT, Security, External Affairs Organizations, Organizational Development, Training, HR…etc.)
- Ensure transparency by communicating, communicating, communicating
- Listen to the knowledge worker

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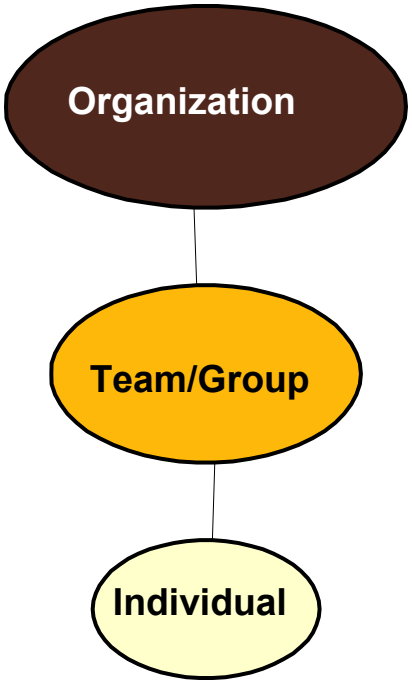
Lessons Learned: Learning



- Develop a measurement plan
- Ensure all measures support strategic direction
- Identify the sources of metrics
- Model the knowledge needed to determine the achievement of the goal or objective
- Get feedback – qualitative measures also uncover significant knowledge
- Remember to use the knowledge learned to improve performance
- Don’t forget to share what is learned

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Lessons Learned: Technology

- Know that technology is not a complete solution
- Have a clear view of where technology is to be inserted
- Partner with a formal Systems Engineering Organization (Enterprise Architecture)
- Be knowledgeable about the capabilities of a tool
- Map the business requirements to the tools capabilities

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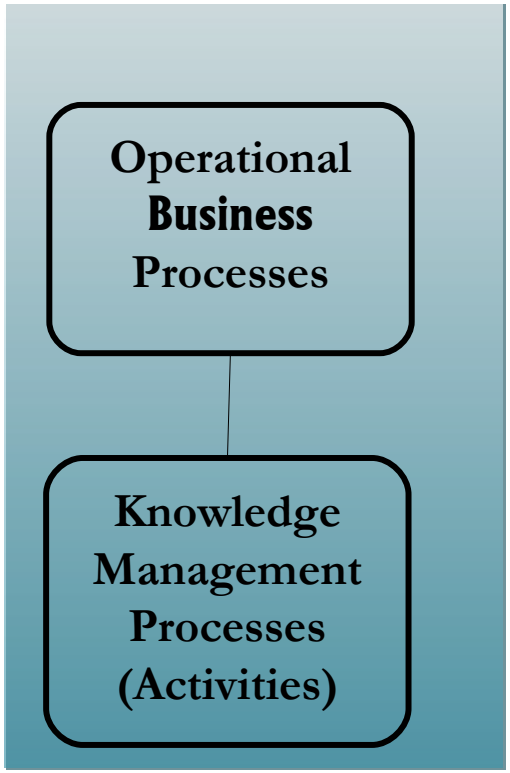
Lessons Learned: Knowledge Management

- KM is not an overnight epiphany
- It takes time to develop a KM solution
- It takes time for a KM Solution to be adopted by the culture

Lessons Learned: KM has business processes



KM introduces new processes specific to the management of **KNOWLEDGE**

There is a need for a **consistent and standard KM methodology** that can be tailored to accommodate the various types of KM initiatives

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From These Lessons Learned grew PLANT

Plan **L**ayout **A**ctualize
Nourish **T**ransition

A **Performance-Based** Knowledge Management (KM) Methodology

Knowledge Capture	Content Management	Communication & Awareness
Feedback	Communities	Technology
Education	Metrics & Measurement	Reward & Recognition

Knowledge **M**anagement Processes

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Knowledge Management Life Cycle

- **Plan** – Build a strategy -- align KM Activities with business strategy, perform analysis, audits, assessments and evaluations of current business operations to establish a baseline
- **Layout** – Design the blueprint to follow for implementation – have a clear picture of KM Activities an how they are aligned to achieve the goals and objectives defined in the strategy
- **Actualize** – Be intentional about implementing KM Activities
- **Nourish** – Institutionalize and Sustain KM activities
- **Transition** – Monitor and control KM Activities and make decisions on their evolution in the KM lifecycle – ensure continuous improvement and learning.

Knowledge Management Processes

- ***Knowledge Capture –*** Perform audits, assessments and evaluations of current business operations *(Best Practices, Lessons Learned, Innovation & Discovery)*
- ***Content Management --*** Generation, maintenance and management of knowledge resources submitted or captured to ensure their quality, relevancy and integrity.
- ***Communications and Awareness --*** Keep staff (employees, contractors, support departments, etc.) informed and "in the know" about the availability of work related knowledge resources, activities and projects.
- ***Feedback --*** Conduct sessions with staff to get their input and contributions to ensure satisfaction with outputs and outcomes of knowledge management activities.

Knowledge Management Processes

- ***Communities --*** Empower staff to identify and implement business operations improvement projects to improve the way they work. Foster a sharing environment that brings staff together to communicate and to promote camaraderie.
- ***Technology --*** Maintain and support the KM architecture and infrastructure as a core tool to support staff in knowledge sharing activities and the organization in knowledge discovery activities.
- ***Education --*** Refine and implement mechanisms and tools to accommodate orientation and training of staff on new knowledge management roles and responsibilities, business processes and activities.
- ***Metrics and Measurement --*** Capture and report performance measures and indicators that show return on investment (ROI) for KM activities and provide a gauge of success.
- ***Reward and Recognition --*** Recognize and reward staff for sharing and helping to improve the performance of individuals, groups and the organization.

Integrated KM Framework

Life Cycle

- **P**lan
- **L**ayout
- **A**ctualize
- **N**ourish
- **T**ransition

KM Processes

- ☑ Knowledge Capture
- ☑ Content Management
- ☑ Communication and Awareness
- ☑ Feedback
- ☑ Communities
- ☑ Technology
- ☑ Education
- ☑ Metrics and Measurement
- ☑ Reward and Recognition

This approach results in an integrated "blueprint" for future success

KM Life Cycle and Processes -- Identifies KM Activities

KM Processes	Plan	Layout	Actualize	Nourish	Transition
Knowledge Capture	Plan-Knowledge Capture	Layout-Knowledge Capture	Actualize-Knowledge Capture	Nourish-Knowledge Capture	Transition–Knowledge Capture
Content Management	Plan-Content Management	Layout-Content Management	Actualize-Content Management	Nourish-Content Management	Transition–Content Management
Communication and Awareness	Plan-Communication and Awareness	Layout-Communication and Awareness	Actualize-Communication and Awareness	Nourish-Communication and Awareness	Transition–Communication and Awareness
Feedback	Plan-Feedback	Layout-Feedback	Actualize-Feedback	Nourish-Feedback	Transition–Feedback
Communities	Plan-Communities	Layout-Communities	Actualize-Communities	Nourish-Communities	Transition–Communities
Technology	Plan-Technology	Layout-Technology	Actualize-Technology	Nourish-Technology	Transition–Technology
Education	Plan-Education	Layout-Education	Actualize-Education	Nourish-Education	Transition–Education
Metrics and Measurement	Plan-Metrics and Measurement	Layout-Metrics and Measurement	Actualize-Metrics and Measurement	Nourish-Metrics and Measurement	Transition–Metrics and Measurement
Reward and Recognition	Plan-Reward and Recognition	Layout-Reward and Recognition	Actualize-Reward and Recognition	Nourish-Reward and Recognition	Transition – Reward and Recognition

Activities and Paths to tailor KM Initiatives

	Strategy	Blueprint	Implement	Sustain	Improve
KM Processes	**Plan**	**Layout**	**Actualize**	**Nourish**	**Transition**
Knowledge Capture	Plan-Knowledge Capture	Layout-Knowledge Capture	Actualize-Knowledge Capture	Nourish-Knowledge Capture	Transition–Knowledge Capture
Content Management	Plan-Content Management	Layout-Content Management	Actualize-Content Management	Nourish-Content Management	Transition–Content Management
Communication and Awareness	Plan-Communication and Awareness	Layout-Communication and Awareness	Actualize-Communication and Awareness	Nourish-Communication and Awareness	Transition–Communication and Awareness
Feedback	Plan-Feedback	Layout-Feedback	Actualize-Feedback	Nourish-Feedback	Transition–Feedback
Communities	Plan-Communities	Layout-Communities	Actualize-Communities	Nourish-Communities	Transition–Communities
Technology	Plan-Technology	Layout-Technology	Actualize-Technology	Nourish-Technology	Transition–Technology
Education	Plan-Education	Layout-Education	Actualize-Education	Nourish-Education	Transition–Education
Metrics and Measurement	Plan-Metrics and Measurement	Layout-Metrics and Measurement	Actualize-Metrics and Measurement	Nourish-Metrics and Measurement	Transition–Metrics and Measurement
Reward and Recognition	Plan-Reward and Recognition	Layout-Reward and Recognition	Actualize-Reward and Recognition	Nourish-Reward and Recognition	Transition – Reward and Recognition

Decompose to Steps

Knowledge Management Life Cycle (KMLC)

Knowledge Area Process: **Knowledge Capture**

	Activities						
1. Plan	1	2	3	4	5	6	7
2. Layout	1	2	3	4	5	6	7
3. Nourish	1	2	3	4	5	6	7
4. Actualize	1	2	3	4	5	6	7

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Roles and Responsibilities

Fundamental to the execution of the KM activities are specific roles that support a continuum of information and knowledge to and from the knowledge workers

KM Roles

- Strategic Roles
  - Chief Knowledge Officer
  - KM Sponsor
  - KM Steering Committee
- Business Functional Roles
  - Knowledge Coordinator
  - Content Manager/Content Coordinator
  - Communication Coordinator
  - CoP Champion
  - Strategist
  - HR Liaison

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KM Roles

- The KM Team Roles
  - Chief Knowledge Strategist Architect/KM Subject Matter Expert (SME)
  - Business Analyst/Knowledge Engineer
  - Community of Practice (CoP) Officer
  - Solutions Architect – Content Modeler & Integrator
  - Solutions Architect – Interface Modeler & Integrator
  - Solutions Architect – Data & Information Modeler & Integrator/Business Intelligence
  - Knowledge Engineer/Business Analyst
  - Communications Officer
  - Content Manager/Content Coordinator
  - KM Developer
  - KM Administrator
  - KM Trainer

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Roles & Responsible Areas

KM Process	KM Team Role	Business Functional Role
Knowledge Capture	Knowledge Engineer/Business Analyst	Knowledge Coordinator
Content Management	Solutions Architect – Content Modeler & Integrator	Content Manager/Content Coordinator
Communication/Awareness	Communication Officer	Communication Coordinator
Feedback	nowledge Engineer/Business Analyst	
Communities	CoP Officer	CoP Champion
Technology	KM Developer KM Administrator Solutions Architect – Interface Modeler & Integrator	
Education	KM Trainer	
Metrics & Measurement	Solutions Architect – Data & Information Modeler & Integrator	Strategist
Rewards and Recognition	Knowledge Strategist Architect/KM SME	HR Liaison
KM Strategy KM Methodology Development/Customizing, Refinement and Management	Knowledge Strategist Architect/KM SME	Chief Knowledge Officer KM Sponsor KM Steering Committee

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Roles, Responsibilities & Competencies

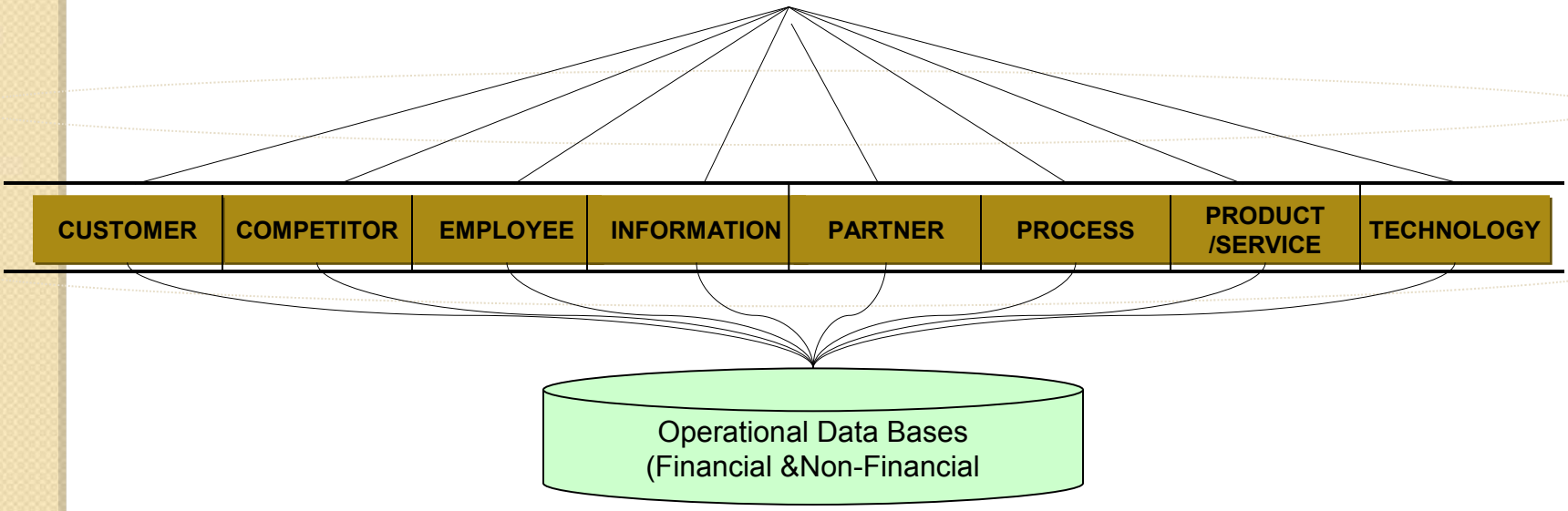
- Responsibilities for each role must be clearly defined
- Competencies to perform each role must be defined (the quality of being adequately or well qualified physically and intellectually wordnetweb.princeton.edu/perl/webwn)
- Competencies must be aligned with training, certifications, courses, a course of study…etc.

Plan Metrics & Measurements

Knowledge to Net Worth

Track the **value creation process**

Identify the value sources of Intangible Assets/Intellectual Capital



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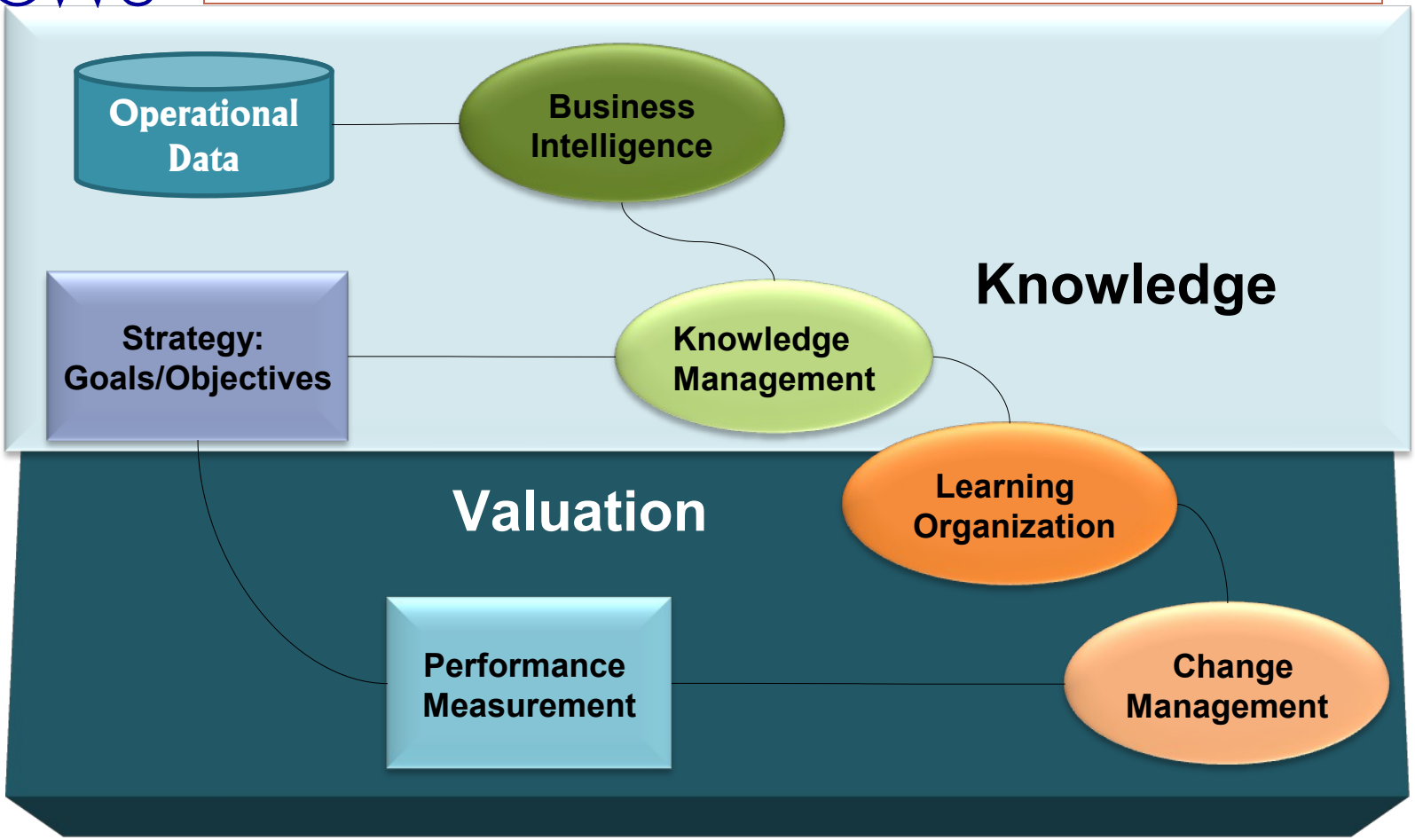
Knowledge to Valuation



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Knowledge Valuation

- **Operational Data** – contains the measures and indicators that align with value sources that drive performance.
- **Intelligence** – measures and indicators from which knowledge can be obtained to questions by inquiries, predictions, explanations and prescriptions for control.
- **Knowledge Management** – building of formal models from the body of intelligence based on rules or principles prescribing a particular course of action.
- **Learning Organization** – accumulate and analyze information in the form of knowledge that is aligned with activities (practices, innovation…etc.) to determine the value added.
- **Change Management** – implement activities or projects that are focused on inner shifts in people's values, aspirations, and behaviors and outer shifts in processes, products, strategies, practices, and systems.
- **Performance Measurement** – measure success factors from different perspectives, as well as perspectives of past, current, and future performance.

Performance-Based KM Methodology

- Brings together diverse components of valuation into a synergistic relationship
- Identifies sources of value that align with business performance
- Uses intelligence constructed from value sources of the business environment
- Formulates a model of potential improvements and corporate ventures that include levels of abstraction that apply to the business environment, which increases the capability to identify more intangible activities and their contribution to organizational performance
- Develops hypotheses as the nature of improvements or corporate ventures being investigated
- Verifies the findings or results rendered from the outcome

A Performance-Based KM Methodology

- Provides an integrated approach to the identification, creation, capture, dissemination, valuation and adoption of knowledge within an organization
- Provides these tools:
  - Processes
  - Procedures
  - Activities
  - Roles and Responsibilities (Competencies)
- Provides these outcomes:
  - KM Strategy
  - A Knowledge Baseline
  - A Blueprint
  - Measures and Indicators linked to intangible asset (intellectual capital) valuation

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Question 1

What strategic roles and responsibilities do knowledge professionals play in organizations today – across all sectors of the economy?

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Question 2

What competencies do today's knowledge professionals need to lead knowledge organizations in the 21st century?

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Question 3

What are the core and elective elements of a knowledge management curriculum for the 21st century?

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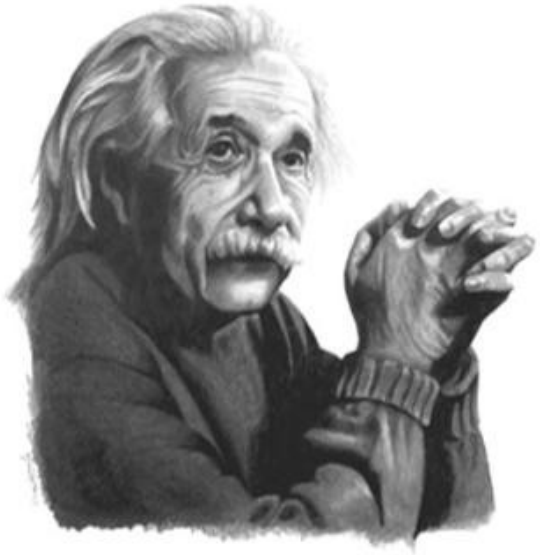
Question 4

How can we support these competencies in professional training, at the certificate level, at the master's and PhD. levels?

Last Words



"We can't solve problems by using the same kind of thinking we used when we created them." …*Albert Einstein*

"Knowledge has to be improved, challenged, and increased constantly, or it vanishes."
…*Peter Drucker*