2

How Organizations Are Using KM

What's Inside This Chapter

In this chapter, you'll learn

▶ Why organizations need to manage knowledge
▶ What elements make up successful KM systems
▶ How your organization can support a KM initiative.

Organizations are deciding to use KM to discover, classify, and validate the knowledge of their employees in answer to essential business needs, such as

▶ retention of the expertise and wisdom of personnel
▶ acceleration of learning and implementation of new standards, processes, and information
▶ increased profits from eliminating duplication of efforts and improving existing processes

- ▶ improvement of ability to make leadership decisions based on historical and practical experiences
- ▶ increased customer satisfaction from more efficient processes and consistency of information they receive from customer service representatives
- ▶ shortened product development time from building on prior successes
- ▶ collaboration on projects by team members in distant locations.

These business needs are a few of the reasons why organizations may realize they have to discover and organize the knowledge of their employees. These reasons often are discovered through a single query or request that prompts the question, "Why isn't this information readily available?" That was precisely the case in the situation encountered by the U.S. Army's Combined Joint Task Force 76.

This example from the August 2008 Knowledge Management Section report of the U.S. Department of the Army outlines the task force's knowledge-sharing issue and how KM was used to improve operations.

Think About This

The need for sharing knowledge is not isolated to business and industry. Government agencies, nonprofit organizations, universities, and even the military are discovering the benefits of organizing and coordinating knowledge assets to reduce duplication, avoid access to outdated information, and shorten the time of search and retrieve functions.

Case Study: U.S. Combined Joint Task Force 76

The U.S. Combined Joint Task Force 76 was working in Afghanistan during Operation Enduring Freedom in 2006. The task force report notes that the need for a KM initiative became clear when the commanding general made the following request: "I want to know how many missions over the last 30 days were conducted by the 3d Brigade Combat Team, and how many utilized aviation assets."

To answer that request, the task force staff had to search folders manually and make calls to subordinate units. It was a time-consuming process that resulted in a slow and inexact response. According to the report, that was no isolated incident.

The task force KM office examined the procedures used to coordinate information on missions and documented a number of problems, including the following:

▶ Each subordinate unit had different methods for tracking mission information such as that requested by the general, with a majority using static spreadsheets.

▶ When task force and subordinate staff sections were assigned a mission, each section planned the same mission in different ways.

▶ When preparing reports for general officers, operations personnel from different staff sections didn't have access to information from the other sections that was necessary to create a vision of the overall operation.

▶ There was no centralized repository for operations information. Much of the information existed only in individual email messages. For example, personnel in subordinate units attached electronic slide presentations to emails they sent to the chief of operations. These were then forwarded to personnel in appropriate staff sections and stored on individual computer stations.

▶ On average, supplying the information requested about mission status took 40 hours and involved manual searches by six subordinate units.

These examples demonstrated that the information-handling process was inefficient, cumbersome, and filled with opportunities for mistakes and breakdowns.

The solution that was developed reduced to 30 seconds the time required to locate the mission-specific information requested. (The specific design process used to create this KM system for the task force is described in more detail in chapter 6.) The solution included the following factors:

▶ A single format for entering report information. Using this reporting template to enter information directly into the database replaced the

use of email messages to transmit data and produced information in standard report form.

▶ A centralized document library with controlled access where reports, presentations, and other task force information was posted.

▶ A database containing the most current information, accessible to the entire task force, to help the task force staff and subordinate staffs with a single access point for the latest mission and asset information.

It was clear that effective KM significantly improved task force operations. The new procedures and supporting software reduced search time to less than a minute and increased the information's accuracy.

The revised processes also

▶ opened a secure, real-time, collaborative information-sharing environment

▶ helped officers make critical decisions by providing relevant information available to the right person at the right time

▶ standardized an inconsistent and labor-intensive process

▶ gave the commanding general quick, relevant, and reliable answers

▶ developed a centralized, searchable database of past and ongoing task force operations.

The issues demonstrated by the task force's example are not unlike the challenges encountered in the business world. The need for coordination of efforts and information, the swift retrieval of vital data, the standardized format to make searches more efficient, and the ability to compare information to make quality decisions are needs shared by all organizations. And the elements that were incorporated into the task force's KM initiative are reflected in many of the most successful KM systems currently in use.

Common Elements of Successful KM Systems

Knowledge management systems that consistently yield the most effective results for their organizations typically have the following factors in common:

▶ The systems incorporate both documented knowledge and the wisdom that is housed exclusively in the minds and practices of experi-

enced employees, presented in formats that match user preferences. These formats range from paper-based file-and-folder setups to combinations of sophisticated software, and they often are built on existing structures, such as additions to the company's current intranet.

▶ The systems include step-by-step procedures for compiling, confirming, circulating, and updating organizational knowledge.

▶ Job descriptions are created for every member of the KM system development team to ensure that there is accountability for work done at each of the five stages of the KM development initiative.

▶ Where applicable, technology such as specialized software, electronic communication systems, and use of the organization's intranet makes the accumulated and archived knowledge available to those who need it in distant locations. (Although high-tech tools are not prerequisites for creating a useful KM system, most organizations that have multiple locations find such tools to be necessary components.)

▶ To capture the knowledge and expertise of retiring employees, organizations use formal documentation, video and audio recordings, one-on-one interviews, and succession-focused mentoring.

▶ The systems establish "gathering places" such as online communities of practice or collaborative workspaces where current employees can share knowledge and discuss ongoing projects.

▶ The organizations work toward creating cultures of knowledge sharing through various incentives, such as rewarding contributions to the knowledge base, spotlighting executive personnel's use of the knowledge base, and recognizing innovations developed from information gathered through the KM system.

▶ The systems are updated continually and are revised and upgraded to answer new challenges that occur within the organization.

Basic Rule 2

Knowledge management systems must engage every department in the organization.

Organizationwide Support for Your KM System

Knowledge management is not solely the responsibility of an organization's information technology, human resources, or training departments. To be effective, a KM system should be organizationwide, both in its contributors and in its users. When the system is in its early development phase, engaging broad support may be a challenge because of organization members' natural resistance to new directions and initiatives.

This resistance may stem from fear of not being able to understand and use this new KM system. It may be connected to the idea that documenting the knowledge they have in their heads will replace the need to keep them in the organization. It's also a step out of the comfort zones that they've been operating in, even if that comfort zone was inefficient and outdated. And, ultimately, employees may not see the need for a KM system because they simply can't visualize the potential benefits for them.

The following activities are good ways to overcome some of that resistance and promote your KM system throughout an entire organization:

- ▶ Encourage executive support for the KM initiative by developing a well-defined project plan that includes a detailed timeline, documented project roles and authority levels, resource requirements, accountability and evaluation methods, risk mitigation and management plans, a training plan, and an ongoing communications strategy.
- ▶ Publicize the support of executive-level managers through organization communications and reveal the degree of their support by highlighting their allocation of time and resources.
- ▶ Be selective in your use of the term *knowledge management.* The term itself can cause confusion and link your effort to the failures that may have happened in earlier KM efforts. Instead, create your program as an answer to a current challenge, linking it directly to organizational goals to counter potential resistance and gain acceptance.
- ▶ Create a steering committee with representatives from across the organization. An effective KM system ultimately must address the needs of all departments, even if it begins with a focus in a limited area.
- ▶ If the system will include a customer service component, get input from current customers.

▶ Request input from the information technology department early in the process. At some point, the KM system will require computer-based tools and access to make it grow. Planning with that growth in mind ensures that the selected input and user formats will make the eventual transition seamless.

▶ Start small and expand incrementally. Introducing your KM program on too broad a basis will make inevitable small missteps at rollout appear disastrous.

▶ Begin in an area where quick wins are possible—for example, put a troubleshooting guide online for one of the most common equipment or process problems in the company. This is the type of victory that affects the bottom line directly and thus gains favorable attention from management and from employees looking for ways to contribute to the organization's success. Promoting these victories will build enthusiasm for the KM system as a whole.

Think About This

Don't underestimate the importance of small initial projects to draw attention to your knowledge management initiative. These can be more than just quick victories; they can serve as illustrations of KM to those who don't fully understand the concept and examples of what KM can accomplish for those who aren't yet convinced of its merit.

▶ At the earliest opportunity, post questions needing answers that will help you discover subject matter experts who may have been missed when the development team first identified the existing and valuable knowledge to be gathered and made accessible to the organization. The broader and deeper the knowledge base, the more productive the KM system.

▶ Recruit a group of key employees to serve as champions and spokespersons for the KM initiative. They can help other employees understand the benefits of the KM system and help dispel misconceptions

about it. Target those employees who are influential and respected in the organization to spread the word and to help you discover any areas of concern among employees.

▶ Seek voluntary participation instead of mandating that employees put information into the system and use it for their research.

▶ Create communications that illustrate the benefits of using the system effectively. Give examples of how to use it in the day-to-day operations of a range of units and departments: highlight some of the most frequently searched topics, share positive anecdotes from people who've used the knowledge base successfully, and profile the experience of an employee who used the information from the knowledge base in the innovation of a new idea.

▶ Present training sessions to introduce employees to the methods of accessing and contributing to the KM system. These may be classroom training sessions that involve actual hands-on practice with searching the knowledge base. They may include meetings where supporting documentation is distributed with step-by-step instructions and where employees are invited to comment on both the format and the knowledge housed in the KM system.

▶ Use recognition and reward to spotlight subject matter experts for their vital contributions to the success of the system. Mention them in organization communications, create an award for outstanding contributions that influence organizational operations, or even present such tangible rewards as prizes or bonuses.

▶ Recognize and reward both employees who put valuable information into the system and employees who use the knowledge base in an outstanding manner. Publicize their contributions to the organization.

▶ Demonstrate the system's value by publicizing successes at each stage of the development process to build support for the future stages of the program. Continue to remind employees that this valuable resource exists and is being improved and updated continually.

Getting It Done

Think about and answer these questions:

1. Who are potential champions for knowledge management in your organization?
2. What departments should be represented on the KM steering committee?
3. What knowledge does this system need to provide to members of the organization?
4. Who are some of the subject matter experts in the organization?
5. What goals will the successful implementation of this program accomplish?