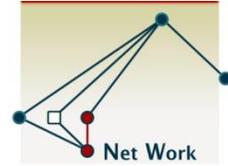


Knowledge Management Assessment & Strategy

Knowledge management is a loosely defined business practice: it is a collection of practices, processes, and technologies that a corporation uses (explicitly or implicitly) to support knowledge work. Knowledge management is both about content and context. Knowledge management (now nearly 25 years old as a discipline) is in its third generation:



- The first generation focused on documents: collecting and cataloging written and published materials in a way that they could be accessed when needed: “Getting the right information to the right people at the right time in a form they can use and a context that will help them succeed.”
- In the second generation, we acknowledged the truths that knowledge cannot be conscripted; that most of what may be essential knowledge is buried in people’s heads and work practices and can only be exchanged through structured and regular interactions.
- Now, the third generation takes into account the explosion of our ability to work in networks: engaging in ongoing conversations and shared learning with multiple stakeholders inside and outside the organization.

Any given organization may be different stages of this same evolution. A large organization may have divisions still focused on content while other divisions are embracing the heady world of social media. In large or in small, knowledge management must understand the context in which people work and provide a plan for shifting the context to enable higher performance and job satisfaction.

An Assessment Framework for Knowledge Management

In a networked organization, relationships among people in the organization, customers, and partners; the relationships among systems and tools; and the relationships among people, processes, and systems and tools themselves are continually changing. Therefore, to manage “knowledge” it is vital to integrate five key systemic elements that contribute to the context of work.

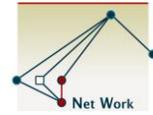


Mission.

What is the role of knowledge in the organization? What types of knowledge – know what, know how, know who – are important for the strategic mission of the organization? Where and how is that knowledge created, and how is it developed and disseminated?

People and Networks.

Who are the people who create knowledge and move it around in the organization? What motivates them? How are they measured? How does the organization use networks to accomplish its mission? What are the networks the organization services and stewards?



Processes and Work Practices.

What are the core processes related to the organization’s strategic knowledge? Are knowledge management practices integrated into employees’ work practices? What is the role of networks and how do employees access and leverage the knowledge inherent in the network?

Systems and Tools.

How does the information and communication technology (ICT) infrastructure enable efficient and effective access to (1) information and people, and to (2) publishing, collaborative, and social processes to capture ideas and content? Are the tools for users “ready-to-hand,” easy to use, and congruent with how people accomplish their work?

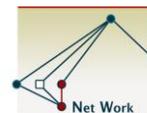
Organizational Infrastructure.

Are job descriptions tailored to include knowledge management activities? What new and unique roles need to be created to support knowledge management? How will the knowledge management system be governed? Who is responsible for strategy, for maintaining the environment, and for measuring the success of knowledge management programs?

The Assessment Process

An assessment normally consists of the following phases; activities in each phase are directed toward specific deliverables.

Phase	Activities	Deliverables
Context setting	Define scope based on the questions associate with the five assessment elements Identify assessment support cadre Kickoff meeting	Agreed schedule Clear expectations
Interviews	Structured interviews with (1) intended users of the system (2) key stakeholders, including executive staff (3) external partners with whom knowledge is exchanged or to whom knowledge is delivered	Detailed problem statement (Notes are held anonymously.)
Survey	Deployment of a short “pulse” survey to detect patterns in organizational acceptance of and executive/management perception of knowledge sharing behaviors and rewards	Survey results
Directed research	Any specific analysis or research determined during the context phase or identified during interviews. Examples: research web sites for comparable organizations; perform usability evaluation of current web site’s interface	As required
Network mapping with optional stakeholder workshop	Maps indicating (1) how knowledge moves across the organization and with its external stakeholders, providing insight into gaps and opportunities (2) potential change agents, people who are widely acknowledged and	Value network map, organizational network map sketches*



Phase	Activities	Deliverables
	recognized as being able to provide thought leadership among their co-workers	
Analysis and recommendation development	Evaluation and writing	Presentation and/or Report addressing the five elements in the KM assessment framework
(Optional) Stakeholder Workshop	Face-to-face, facilitated session among stakeholders to review recommendations and establish next steps	Workshop report and action plan

Planning for an Assessment

A certain amount of “work” is accomplished during the contracting phase, in which we identify the specific goals of the assessment and the intended results. The contract produced from preliminary conversations represents in itself a quality document stating the key success factors for a knowledge management assessment and ongoing work.

A second fundamental of a successful project is the identification of a cross-organizational set of champions – influential change agents in the organization – who provide critical insight and input into the assessment and strategy process and who are instrumental in motivating their co-workers to adopt new behaviors and work practices.

The time required to complete an assessment is dependent on a number of factors:

- The size of the organization and the number of people to be interviewed.
- The scope and deliverables for any directed research.
- The number of presentations/workshops that will be delivered to present the results of the assessment.

My assessments have ranged from a 4-day project for a 90-person conservation firm to a 3-month project for a 6,000-person government research firm.

Standard rates for work:

- Corporate: \$2000 (\$250/hour)
- Nonprofit: \$1200 (\$150/hour)

The rate for long (3 month or more) projects is negotiated.

Rates do not include travel or incidental expenses.