

Re-Inventing Knowledge Management

*Conducting the Knowledge Services Audit and
Developing the Strategy Plan for
Knowledge Services*

Re-Inventing Knowledge Management

Here's What We'll Do

- Review the concepts associated with KM
- Discuss audit fundamentals
- Discuss strategy planning basics, within a Knowledge Services context:
 - Imagining the future: articulating the vision, mission, and values as drivers for successful service delivery
 - Assessing current services: the management review
 - Focusing on results: monitoring, measuring, and examining
- Review the knowledge services audit and strategy planning as management tools

The “Burning Platform” for Establishing Knowledge Services

Why create a KD/KS (knowledge development / knowledge sharing) culture?

- we’ re in the *expertise* business
- we’ re specialists
- the work of the enterprise is wide-ranging and, in many cases, geographically dispersed (information flows *into* the enterprise from widely dispersed sources)

Knowledge Analysts/Managers Lead the Way

“My job is to help an extended organization, including its customers, partners, and suppliers, manage or leverage their collective intellect in order to produce a change in its profitability and growth—and to renew themselves as a business by better organizing its knowledge assets to create new knowledge, new products and services, and to change the entire competitive playing field.”

–Kent Greenes
Chief Knowledge Officer & Senior Vice President
Science Applications International Corporation

Assessing Current Services: Knowledge Stakeholders

Knowledge stakeholders are the people in – or connected with – the organization, the people who:

- Benefit from its services / products
- Manage it
- Work in it
- Supply or contract with it
- Have any other affiliation with it

Why *Re-Invent* Knowledge Management?

- From a management perspective, IT goals have not been met
- Concern from non-information focused managers about the role of KM in the organization
- Successful KM = Accepting change as a given (recognizing that change is both inevitable and desirable)
- Knowledge drives decision support
- Only the knowledgeable survive

How Information/Knowledge Professionals Lead The Enterprise to *Knowledge Services*

- Establish the knowledge objective
- Conduct a knowledge audit
- Determine goals and expectations for *Knowledge Services*
- Decide on a management approach

Imagining the Future

Vision / Mission / Values

- Identify (or assist in establishing, if necessary) the *Knowledge Services* vision: what does *Knowledge Services* intend to be for the parent organization?
- Identify the *Knowledge Services* (and the organization's) mission. What is the organization's mission? What is the *Knowledge Services* mission?
- Identify *Knowledge Services* values in the organization: What are the organization's values? What is the organization's culture?

Imagining the Future: **Vision / Mission / Values**

- The Vision Statement: an image in words of what success will look like
- The Mission Statement: communicates the essence of the organization – why it exists
- The Values Statement: the principles or beliefs which guide stakeholders as they pursue the organization's purpose

- Michael Allison and Jude Kaye

Strategic Planning for Nonprofit Organizations, 1997

Analyze the Current Information/Knowledge/ Learning Environment

- Identify current trends in *Knowledge Services* management (for now: analyze each discipline separately)
- Identify the range of services provided in organizations implementing *Knowledge Services* efforts, especially those recognized for excellence in service delivery
- Describe the strategic benefits of these services

Current Trends in “World-Class” Knowledge Services Management

- Holistic management, integrated into the larger organizational framework
- Cross-functional collaboration
- Operational unit performs strategic function, and is recognized as the central information/knowledge/learning connection (the knowledge nexus) for the organization
- Clear vision/mission/values
- Awareness building is a given

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Current Trends in “World-Class” Knowledge Services Management

- Service ethos builds on higher-value services
- Adding value to services, products, and consultation is standard practice
- Customer needs are tracked on an on-going basis
- New paradigms of service delivery are recognized as opportunities for enhancing Knowledge Services in the larger organization
- Advocates and users recognize the value of the function and make efforts to see that it is supported

Preparing for the Future...

- Identify what *Knowledge Services* should provide for the organization
- Compare/contrast current information management, knowledge management, and strategic learning against future needs
- Determine strategic direction
- Establish resource requirements
- Incorporate change management and change implementation into the operational function

Change Management/Change Implementation

The Information/Knowledge/Learning Environment: What's Different?

1. Information marketplace
2. Information delivery mechanisms
3. Role of information/knowledge in organization
4. Societal change
5. Cross-border information flow
6. Expectations of information customers
7. Desire for excellence within the industry itself

Guy St. Clair
Change Management in Action, 1999

Change Management/Change Implementation

Organizational Readiness for Change

The change-adept organization is one that is constantly investing in three things:

- innovation
- learning and professionalism
- collaboration

Rosabeth Moss Kanter
Training and Development, July, 1998

Change Management/Change Implementation

Establishing Change Readiness in the Organization

1. Build a foundation
2. Communicate with constituents
3. Encourage participation
4. Expect resistance
5. Create rewards and benefits for stakeholders
6. Lead the change skillfully

Rick Maurer
“Building the Capacity for Change,” 1998

Change Management/Change Implementation

The Process

1. Establish a sense of urgency
2. Create the guiding coalition
3. Develop a vision and a strategy
4. Communicate the change vision
5. Empower broad-based action
6. Generate short-term wins
7. Consolidate gains and producing more change
8. Anchor new approaches in the culture

John Kotter
Leading Change, 1996

Assessing Current Services: Strategic Issues

“What the organization must get right if it is to prosper over the next few years.”

- Organizational Structure
- Financial Planning and Management
- Building Support and Identifying Advocates
- Information Management
- Knowledge Management
- Strategic Learning/Training
- Marketing/Awareness Building
- Infrastructure/Planning for Future Needs

Assessing Current Services: The Knowledge Services Audit

Sometimes referred to as an “information audit” or a “management review”, the Knowledge Services audit looks at three elements:

- The organizational structure
- Knowledge Services in the organization, and service delivery
- Marketing, awareness-building, and identifying advocates and champions

Assessing Current Services: The Knowledge Services Audit

The purpose of the Knowledge Services audit is to

- Identify internal *strengths* (“what we do well”)
- Identify internal *weaknesses* (“where we can improve”)
- Can also look at *opportunities* and *threats*, using the classic SWOT methodology
- Incorporates the environmental scan

Assessing Current Services: The Knowledge Services Audit

The Knowledge Services Audit – The Essentials

- Management Commitment
- Desire for Quality (on the part of *all* stakeholders)
- Leadership Responsibility
- Service Excellence
- Leadership Positioning for the Specialized Library

- Guy St. Clair

Beyond Degrees: Professional Learning for Knowledge Services

From Librarianship to Knowledge Services
Berlin – May 2004

Assessing Current Services: The Information Audit

“...a systematic method of exploring and analyzing where a [specialized] library’s various publics are going strategically, and of determining the challenges and obstacles facing those publics. The audit, which raises questions about where and how these publics find and use information, gives the library a better understanding of the present and future needs of its constituents, which in turn helps the library determine its own most appropriate strategic direction.”

- Sharon LaRosa, 1991

Apply to -

Information Management / Knowledge Management / Strategic Learning
(Knowledge Services)

Assessing Current Services: The Information Audit

“...a process that examines how well the organization’s information needs and deliverables connect to the organizational mission, goals, and objectives.”

- Guy St. Clair, 1997

Apply to -

Information Management / Knowledge Management / Strategic Learning
(Knowledge Services)

Assessing Current Services: The Knowledge Services Audit

The successful management of Knowledge Services within an organization depends on

- Understanding how external environment influences internal processes and procedures
- How well Knowledge Services align with strategic goals and objectives of the organization
- Continual assessment of how well Knowledge Services supports strategic goals and objectives
- Understanding Knowledge Services “flows” within the organization
- Understanding how change is handled in the organization

– Adapted from
Sue Henczel

The Information Audit: A Practical Guide

Assessing Current Services: The Knowledge Services Audit

The Seven-Stage Model:

1. Planning
2. Data Collection
3. Data Analysis
4. Data Evaluation
5. Communicating Recommendations
6. Implementing Recommendations
7. The Knowledge Services Audit as a Continuum

– Adapted from
Sue Henczel

The Information Audit: A Practical Guide

Focusing on Results

When we measure, we recognize that effective systems result from the proper synthesis of

- Management style
- Managerial intuition
- Logic and analysis
- Organizational culture
- Planning processes, tools, and techniques

George A. Steiner
Strategic Planning, 1979

Focusing on Results: Monitoring/Measuring/Evaluating

- Determine perceived value (*vis-á-vis* “real” functional role in the organization/community)
- Effective measures vs. statistics
- Interviews with stakeholders (including non-users)
- Customer service/satisfaction surveys
- Benchmarking with similar organizations
- Literature reviews
- Networking/professional KD/KS

Focusing on Results: Monitoring/Measuring/Evaluating

- Create metrics locally and establish ROI within the enterprise at large
- Formalize links between the organization's economics, strategy, and knowledge assets
- Reward and recognition: people must be willing to identify opportunities for KD/KS
- Reward and recognition: reward those who *use* knowledge as well as those who develop it and share it

The Strategy Plan: The Discipline of Innovation

“The goal of most organizations is not just to deliver services but to foster change and improve lives....

“We have to learn in our organizations what is needed to perform and innovate.”

Peter F. Drucker

We achieve excellence of service by doing three things:

1. Focus on the mission
2. Define the results we are after
3. Assess what we're doing and how we do it

The Strategy Plan: The Discipline of Innovation

“One of the tasks of leaders is constantly to make sure that we put scarce resources of people and money where they do the most good. We have to be results-focused and opportunity-focused. Good intentions are no longer enough.”

Peter F. Drucker

Whatever the organization is striving to achieve, the task (both now and in the near future) is to...

- Review
- Plan
- Decide on strategies
- Implement strategies
- Monitor and review the success of strategies implemented
- Move to new strategies based on lessons learned

We Must Identify Issues/Challenges....

- In any organization, no matter how large or small, there are established planning categories to be thought about:
 - Management
 - Organization
 - Process/Methods/Tools
 - Training
 - Performance

And We Must Always Be Aiming For...

- An intense focus on customer service
- Accurate measurement
- Continuous improvement
- Work relationships based on trust and teamwork
- A desire for quality on the part of all organizational stakeholders
- The commitment and enthusiasm of senior management

Knowledge Services

Establishing the Strategic Purpose

And think about building the business case:

- Identify the bottom-line impact
- Focus on projects with short-term payoff
- Establish meaningful measures of progress and demonstrate results
- Talk about future opportunities in a *Knowledge Services* environment

The Strategy Plan (“Master Plan”)

- The purpose: to help the organization do a better job
- Strategic: choosing how best to respond to circumstances
 - Building commitment
 - Priorities
- Systematic
 - Requires following a process
- The goal is to achieve a *results-focused* and *opportunity-focused* organization

Why Plan Strategy?

- Forces all stakeholders to focus on the organization's purpose, business, and values
- Provides a blueprint for action
- Identifies milestones which can be used to monitor achievements and assess results
- Provides information that can be used to market the organization

Michael Allison and Jude Kaye

Strategic Planning for Nonprofit Organizations, 1997

Successful Strategy Planning

- Creates a forum for understanding why the organization exists and the shared values that should influence decisions
- Fosters successful communication and teamwork among all constituencies
- Lays the groundwork for meaningful change (it focuses on what's really important)
- Brings everyone together to pursue opportunities for better meeting the needs of customers and clients

Michael Allison and Jude Kaye

Strategic Planning for Nonprofit Organizations, 1997

The Strategy Planning Process

1. Getting ready
2. Articulating the vision, values, and mission
3. Assessing the environment
4. Agreeing on priorities
5. Writing the strategy plan
6. Implementing the strategy plan
7. Monitoring and evaluating

Michael Allison and Jude Kaye

Strategic Planning for Nonprofit Organizations, 1997

Getting Started

- Identify specific issues or choices that the planning process should address
- Clarify roles (who does what in the process)
- Create a Planning Committee (“Working Group,” “Task Force,” etc.)
- Develop an organizational profile
- Identify information that must be collected to help make sound decisions

Michael Allison and Jude Kaye

Strategic Planning for Nonprofit Organizations, 1997

From Librarianship to Knowledge Services
Berlin – May 2004

Assessing the Organizational Environment

Re: Information/Knowledge/Learning Management

- Using the Findings of the Knowledge Services Audit
 - Examine and Analyze Information Delivery Processes
 - Define Customer Expectations
 - Establish Management Expectations
- Review Current Management of All Information / Knowledge / Learning Functions
 - Specialized Research Library
 - Archives / Records
 - IT
 - KM
 - Learning
 - Others to be identified
- Review the Collaborative Environment

How Long Does Strategy Planning Take?

Depends on...

- The degree of commitment to the current vision, mission, and values statement
- The amount of new information
- The level of agreement on priorities
- The level of trust
- Involvement of key stakeholders
- The size of the organization

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Strategic Planning for Nonprofit Organizations, 1997

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The Strategy Plan: Format for Simplicity

- **Goals:** Very few, but taken together the goals link to the organizational vision, using values that all stakeholders support (and which have been identified and agreed upon)
- **Objectives:** Broad direction, “big picture” achievements that will support the organizational mission, again using values that all stakeholders support (and which have been identified and agreed upon)
- **Strategies:** Specific steps to be accomplished in order to achieve the goals
- **Actions:** Specific “To-do” activities (tactics) that support the established and agreed-upon strategies