



Cloud-based Library, Information, and KM/Knowledge Services Solutions

*Transforming Libraries*

**Building Your Master Plan for  
Knowledge Services  
Your Strategic Road Map**

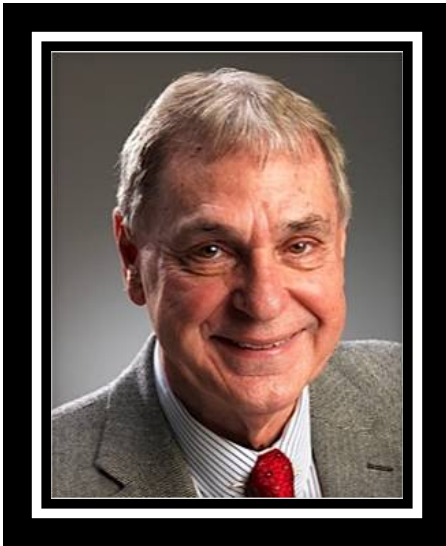
Thursday April 23, 2015  
11.00am PDT/2.00pm EDT



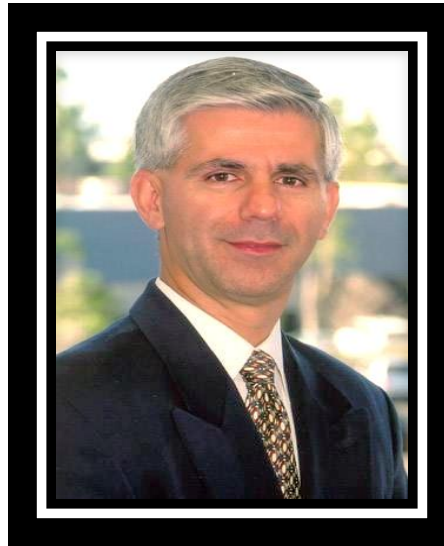
Cloud-based Library, Information, and KM/Knowledge Services Solutions

# Transforming Libraries

## Today's Presenters



Guy St. Clair



Tony Saadat



Maria Phipps



# Transforming Libraries

## Future Ready!

Our presenter – Guy St Clair – asks:

- 1. Why does your company need a master plan for knowledge services?*
- 2. Who else has done work like this? Are you aware of collaboratively minded colleagues who can advise you?*
- 3. Are you prepared to lead – or to identify change leaders who will advise you how to lead – the required change management/change implementation process?*



## Transforming Libraries

*“Our goal at Soutron Global is to partner with our clients to manage the library transformation by introducing the best technology in the most cost effective manner.....”*

*We have created a collaborative culture that is differentiated and unique.....”*

*Tony Saadat*



**Transforming Libraries into  
Digital Information Resource Centers**

**Building Your Master Plan for Knowledge Services  
Your Strategic Road Map**

**Guy St. Clair**

President and Knowledge Services Evangelist  
SMR International

Lecturer in Knowledge Services  
Business Certification and Post Baccalaureate Programs  
Columbia University in the City of New York

Consulting Specialist for Knowledge Services  
Soutron Global

Today's webinar is based, in part, on [Starting KM in Your Organization: Here's Your Strategic Road Map](#) (SMR International Special Report, January 2012).



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## What's a Master Plan?

Once Called “Long-Range Planning”  
Then “Strategic Planning” or, better,  
“Strategy Development.”

Peter Drucker put it in perspective:

“The future requires decisions – now. It imposes risk – now. It requires action – now. It demands allocation of resources, and above all, of human resources – now. It requires work – now.”

**ACTION POINT:** Focus your long-range planning on decisions based on such questions as these: “Which of our *present* businesses should we abandon? Which should we play down? Which should be push and supply new resources to?”



## Our Strategy Planning Responsibility (Or, Planning to Plan)

We use ***strategy*** to ensure that our goals are achieved.

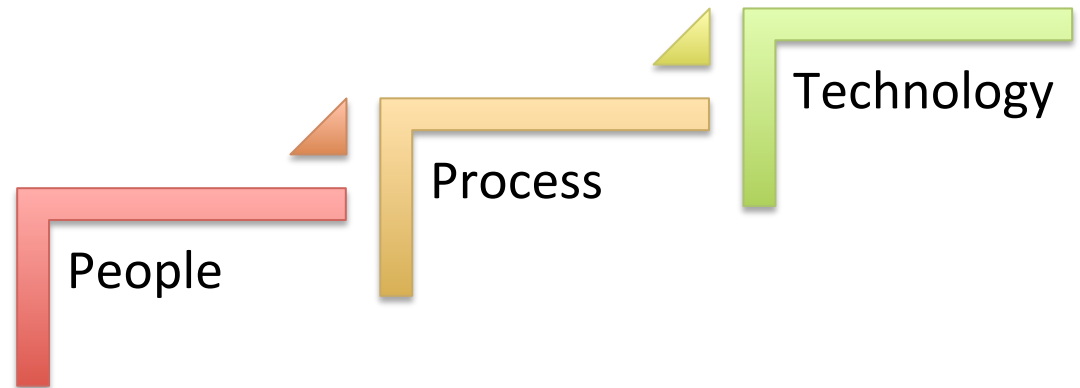
We use ***management*** to control ***how*** what we want to get done gets done.

We use ***leadership*** to ***provide guidance*** and ***direction*** to ensure that what we want to get done gets done.



## Why a Knowledge Strategy?

...the management discipline that ensures organizational effectiveness by matching intellectual capital management with the corporate or organizational mission.



Knowledge strategy: “the organization’s business strategy that takes into account its intellectual resources and capabilities”

Michael F. Zack “Developing a Knowledge Strategy”  
California Management Review, 41 (3), Spring, 1999



## Why a Master Plan? – A Knowledge Strategy

***Our first discussion point:***

***Why does your company need a master plan for knowledge services?***

***As research specialists and managers of specialized libraries, we and our company's leaders are confronted with knowledge services challenges***



## Organizational Effectiveness

*“Organizational effectiveness begins with an enterprise-wide knowledge culture, built on a knowledge strategy supported by successful knowledge development, knowledge sharing, and knowledge utilization (what we like to call KD/KS/KU).”*

[...with “KD/KS/KU” in some environments referred to as “information management & collaboration” – we use the language that fits the organization.]

## Organizational Environment

Bringing together the many “discreet disciplines” working with information, knowledge, and strategic learning to:

- Establish the organization as a knowledge culture
- Utilize organizational knowledge/intellectual capital in support of the organizational mission.



## Your Knowledge Strategy Road Map

1. Define what you want to do
2. Define your terms
3. Don't go it alone
4. Think big and lead the change
5. Identify what's been done already
6. Identify resources
7. Conduct the knowledge audit
8. Develop the knowledge strategy
9. Strategic planning/implementation
10. Set up your metrics



Implementing your start-up knowledge services initiative:  
Journey's End? No Way!



# POLL

Polling Question # 1: What is the planning “picture” in the company where you are employed?

- Formal – a planning hierarchy closely observed [46%]
- Informal – people plan when they are required to do so [25%]
- Casual – no real planning but the work gets done [17%]
- Don't know [13%]

[Results posted Friday April 24, 2015]

## Getting Ready

***Our second discussion point:***

***Who else has done work like this? Are you aware of collaboratively minded colleagues who can advise you?***

***In other words  
(from Guy's Road Map):***

- 3. Don't go it alone**
- 5. Identify what's been done already**



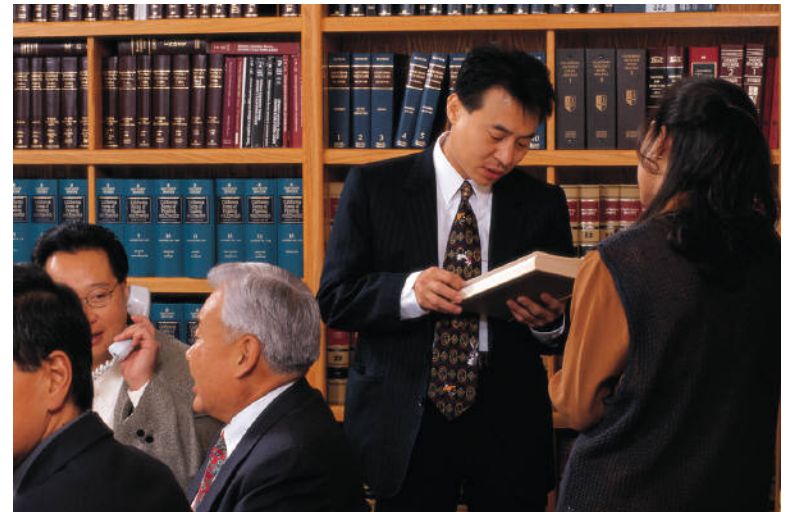
## Scope Out the Firm—How do Things “Work”?

- Who are the information/knowledge “gatekeepers”?
- What is the firm leadership’s “take” on KM and knowledge services?
- Is there a firm-wide knowledge strategy?
- What is the information governance “picture”? Who “owns” KM and knowledge services



## What's Been Done? Who Carried Out That Project?

- When was the last time someone in the company tackled KD/KS/KU?
- Is there a leader in charge of keeping information, knowledge, strategic learning management current?





## Make Your Case

- What's the firm's KD/KS/KU vision?
- Is it well articulated?
- Communicated wisely?  
Clearly?
- Has there been planning for future KD/KS/KU?
- Does everyone know where they are going with KD/KS/KU?



## Next Steps

***Our third discussion point:***

***Are you prepared to lead the required change management/change implementation process? Or to identify change leaders who will advise you?***

***In other words  
(from Guy's Road Map):***

- 7. Conduct the knowledge audit**
- 8. Develop the knowledge strategy**
- 9. Strategic planning/implementation**



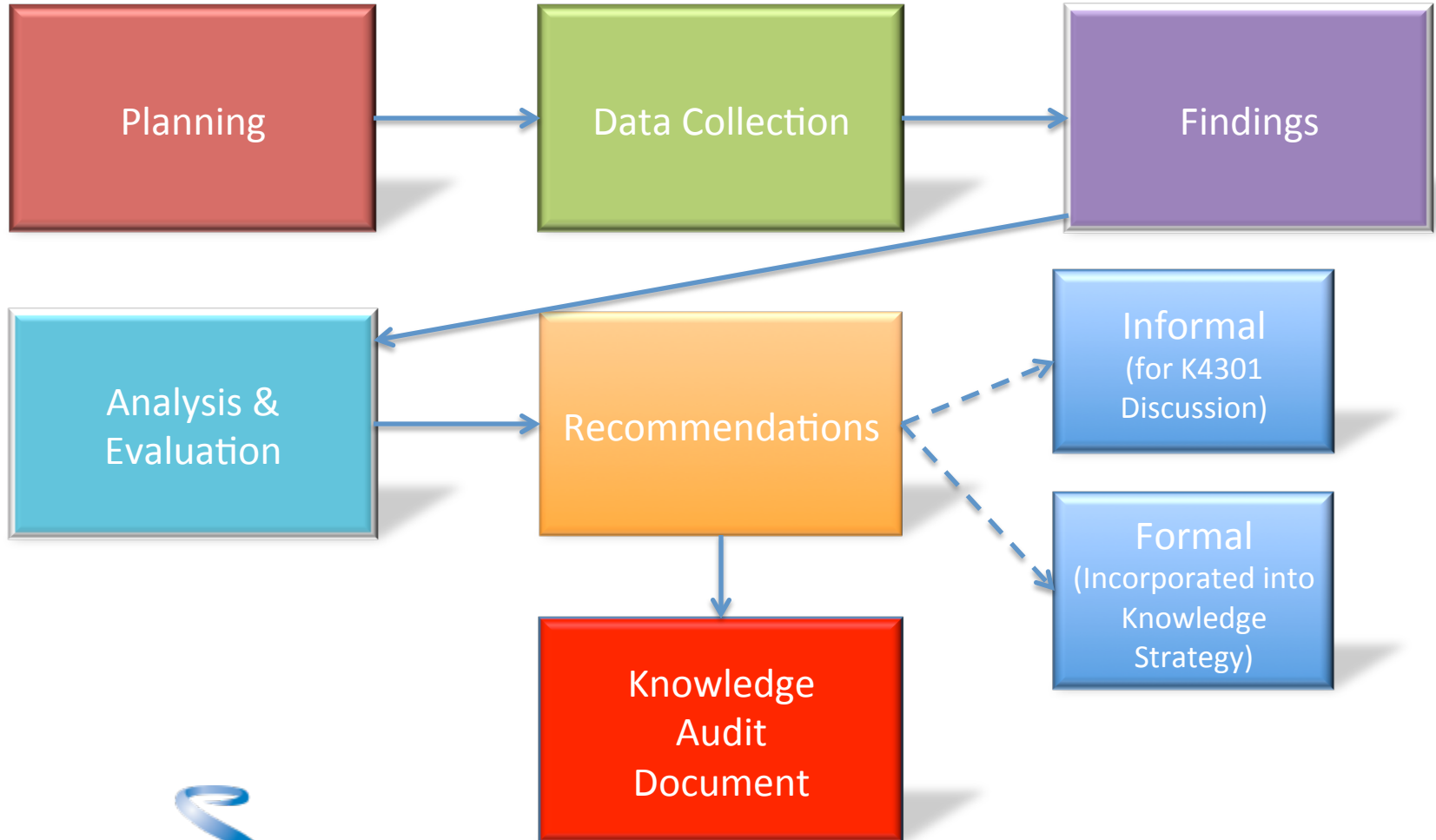
## Conduct a Thorough KD/KS/KU Assessment ("Knowledge Audit")

- Establishes the validity of the change
- Identifies gaps, barriers to KD/KS/KU
- Clarifies scope (case-based, research, operational, other)
- Uncovers attitudes about knowledge value and use
- Stimulates buy-in (at all levels)



# Building Your Master Plan for Knowledge Services: Your Strategic Road Map

## The Knowledge Audit

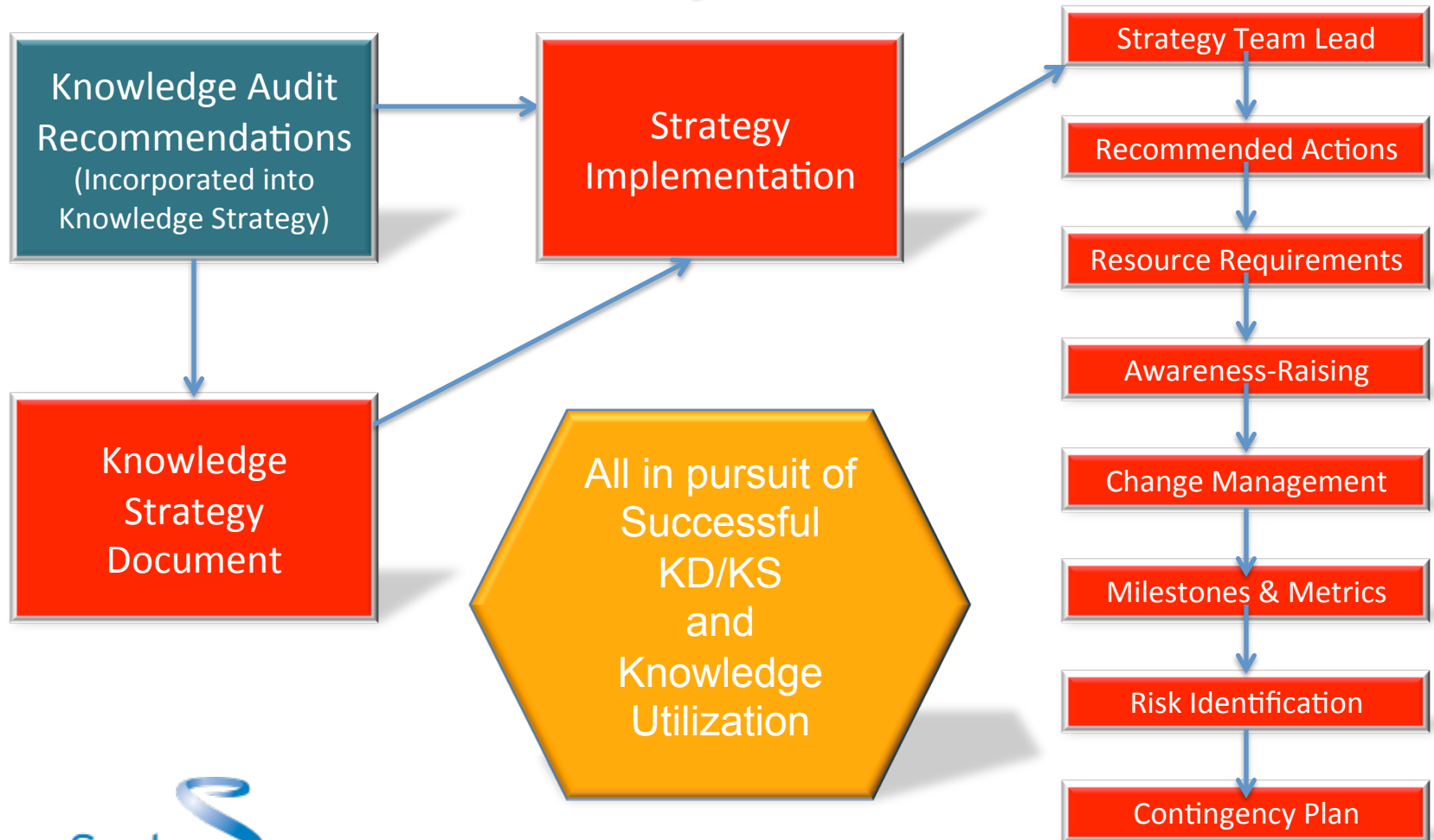


# Learn Everything You Can about Knowledge Strategy—Then Develop the Knowledge Strategy

- Actions we want to see and actions that emerge  
- Shawn Callahan
- Knowledge strategy:  
“business strategy that takes into account the firm’s intellectual resources and capabilities”  
- Michael Zack



# Developing the Knowledge Strategy: Process, Overview, and Implementation Considerations





# POLL

Polling Question # 2: In your present position, does this detailed planning framework appeal to you?

- |   |       |
|---|-------|
| <input type="checkbox"/> Yes                          | [46%] |
| <input type="checkbox"/> Possibly                     | [46%] |
| <input type="checkbox"/> No                           | [ 0%] |
| <input type="checkbox"/> Not sure (or not applicable) | [ 8%] |

[Results posted Friday April 24, 2015]



Cloud-based Library, Information, and Knowledge Management Solutions

Coming May 21, 2015

### **TRANSFORMING LIBRARIES**

## **How Good is KD/KS/KU in Your Company? What Problems Need to Be Solved?**

Talking Points for May 21:

- 1. How do you identify the knowledge services gaps where you work? Better yet, are there knowledge-related activities that are being done well?*
- 2. How do you identify the people who can best describe the knowledge services “situation”?*
- 3. Can the manager of the specialized library lead the initiative to raise awareness about high-quality KD/KS/KU?*





Cloud-based Library, Information, and Knowledge Management Solutions

## **SPECIAL NOTICE**

**Coming Tuesday, June 16, 2015 at the SLA Annual Conference:**  
**Invitation-Only Seminar from Soutron Global**  
**[Time and Location to be Announced]**

### **TRANSFORMING LIBRARIES**

**ANNOUNCING THE FIRST KNOWLEDGE-SHARING TOOL  
DESIGNED SPECIFICALLY FOR SPECIAL LIBRARIES:**

**THE SOUTRON GLOBAL SKILLS DATABASE**

SLA Past President GUY ST. CLAIR will share his thoughts—based on more than 40 years of experience working with specialist librarians—about the need for a unique, specially designed knowledge-sharing tool, completing the search for Knowledge Development, Knowledge Sharing, and Knowledge Utilization (KD/KS/KU) technology supporting excellence in knowledge services.

# THE SLA/SMR INTERNATIONAL KM/KS CERTIFICATE PROGRAM

## The Courses

- KMKS101 Fundamentals of KM and Knowledge Services  
(SLA Annual Conference, Boston MA, June 12, 2015)
- KMKS102 The Knowledge Audit: Evaluating Intellectual Capital Use  
(SLA Annual Conference, Boston MA, June 13, 2015)
- KMKS105 Change Management and Change Implementation in the Knowledge Domain (online September 16-30, 2015)
- KMKS101 Fundamentals of Knowledge Management and Knowledge Services  
(online October 13-28, 2015)
- KMKS104 Networking and Social Media: Technology-Enabled Knowledge Sharing (online February 8-24, 2016)
- KMKS102 The Knowledge Audit: Evaluating Intellectual Capital Use  
(online April 11-27, 2016)
- KMKS103 Knowledge Strategy: Developing the Enterprise-Wide Knowledge Culture (online September 12-28, 2016)
- KMKS106 Critical Success Factors: Measuring Knowledge Services  
(online October 5-26, 2016)
- KMKS101 Fundamentals of KM/Knowledge Services  
(online October 31-November 16, 2016)

Contact: [http://www.sla.org/learn/certificate-programs/cert\\_knowledge\\_mgmt/](http://www.sla.org/learn/certificate-programs/cert_knowledge_mgmt/)

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# Thank you



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