



# ENTERPRISE KNOWLEDGE

Global Knowledge & Information Management Services

## 3 Steps to Developing a Practical Knowledge Management Strategy: Step #1 Understand the Current State





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## 3 Steps to Developing a Practical KM Strategy: Step 1



The challenge with creating a KM strategy that works is that one size does not fit all. In reality, your KM strategy must be intimately tailored to your specific environment, technology ecosystem, and business goals. In order to develop a practical, realistic, and successful KM strategy, you need an in-depth grasp of the current situation.

We are often approached by clients who, in their attempt to develop their KM strategy in-house, failed to fully grasp the fundamentals of their current challenges. Having a sound KM strategy is not only about having a SharePoint or Drupal installation with a nice interface or a set of KM policies documented. There are many crucial factors that influence how KM becomes a true and working part of an organization, many of which have little to do with technology.

To cover these various factors, at EK we approach the Current State Assessment from five perspectives: People, Processes, Content, Culture, and Technology. We purposefully list Technology last, as it reinforces a key point for our work, that Technology is an enabling tool for KM, not the complete solution itself.

### 1. People

Organizations often make the mistake of focusing solely on technology and underestimating the people aspect. However, no matter how cutting edge and cool technology is, if it doesn't cater to the actual needs and preferences of your users, adoption will suffer drastically.

With that in mind, here are some critical questions to ask when developing your KM Strategy:

- Who are your users: demographics, business units and structure, roles, etc.?
- What information do they need on a daily basis?
- How do they connect and communicate currently? How would they like to do that in the future?
- Are there established thought leaders? If not, what is preventing that?
- Do they like sharing expertise? If not, what is stopping them?
- Are there any informational and/or functional silos within the organization, and what is the root cause for their formation?

It is important to understand the composition of your staff, their communication patterns, and their preferences, as well as the information they need. For example, in a past project with a global Fortune 500 company, we found the same search interface was going to be used differently by executives compared to directors and even more junior associates. Executives were more focused on most relevant results of a specific topic and type while associates were



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interested in relevant results across topics, business units, and document types. In other words, depth versus breadth.

Understanding who your audience is, their communication channels, and any existing or potential barriers to information flow will guide the next step of your KM strategy development, the Target State Definition.

### 2. Processes

Organizational processes are driven by information. Every step in a process consumes some kind of data, and produces some form of output, be it a document, the number of produced items, or a simple email. As such, analyzing organizational processes is integral for developing a working KM strategy.

When analyzing current processes in an organization, we address questions like the following:

- What are the main business processes for the organization, as well as for each business unit?
- How are the processes instantiated, applied, and followed? What are the gaps, and where can they be improved?
- Does your staff perceive the existing processes as efficient or more cumbersome than necessary?
- How are the processes being followed in “real life?” Are there established roles and well defined staff to fill these roles in each process step?

It is important to note that understanding an organization’s processes goes much deeper than what they have documented as “official” processes. Many organizations have created processes that work at various levels, but have yet to be expanded enterprise-wide or established as “official” to the organization. A key component of our process discovery work is learning what is being done that is working and could potentially be expanded upon.

Understanding your processes and their data needs feeds important information to the next step of the KM strategy development: developing a Target State where a mutually beneficial relationship between your KM and business processes leads to improved efficiency and retention of organizational knowledge; where capturing, finding, and sharing information is an integral part of the business process rather than a burden.

### 3. Content

Hand-in-hand with understanding organizational processes, analyzing the information and content that flows through these processes and how, is another critical aspect for forming the Current State Assessment and guiding the Target State definition. There is more to understanding content than just a straightforward content analysis effort. While diving into the actual content analysis, also consider the following:

- How “fresh” is your content and what are the obstacles for keeping it current? How much does your staff trust the content they find on internal systems?



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- Where is this content housed? How is it organized and accessed? Is there a defined access control in place? Are there security and confidentiality concerns that need to be addressed?
- Do people collaborate in contributing new content? Are there approval workflows with established roles in place or are they not needed?
- What are the current procedures for knowledge retention when staff members leave?
- Do you need to collaborate or share some of your content with external audiences?
- How has the content been enhanced (with tags, formatting, etc)?
- Again, what silos exist and why?

Much of the discussion on content is tightly intertwined with the analysis of processes and vice versa. Knowledge objects are the building blocks of knowledge retention and dissemination through established processes. Performing content analysis will help you identify gaps, stale content, potential security risks, missing or deficient processes, and other areas that should be addressed in the Target State Definition.

### 4. Culture

Another important aspect that has crucial impact on enterprise KM, yet is often overlooked, is company culture. Along with processes and procedures, company culture shapes staff's behavior and attitude toward capturing, managing, and sharing information. For example:

- Is knowledge sharing fostered by your company's culture? Are there incentives for thought leadership contributions?
- Do people like to share or do they prefer to keep their intellectual property to themselves?
- What about sharing across business units?
- Further, does your staff feel pressured to maintain high utilization and does "data entry" hinder that?

These are just a few questions, but the answers will help guide a realistic KM Target State for your company. For instance, if collaboration between business units is important, yet there is information that needs to be protected, then streamlined sharing and content security are two important factors to be considered in the next steps of the KM strategy development, namely the Target State Definition and the KM Roadmap.

### 5. Technology

Covering the above aspects, by this point you would have heard the most important technology-related pain points. It is important, however, to thoroughly understand the existing technology ecosystem and the restrictions it implies. We approach this effort by addressing questions like these:

- Is there an existing IT architecture plan? What is the level of integration between systems, e.g. user account management, content and document management, intranet, search, taxonomy management, marketing and finance applications, etc.



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- What is the technology stack preference of the organization? Microsoft, open source?
- What are the technology development and maintenance capabilities of the organization? Is there dedicated IT staff? What are their skills?
- Where in their lifecycle are current systems? Are any of them planned to be sunset? Are any new ones already in the procurement process?
- What are the cost factors? Do license restrictions cause inefficiencies?
- Is there an access control plan for the full technology ecosystem? If not, what issues does that cause?

Depending on company size, technology infrastructure can be minimal or overwhelmingly large and complex. For instance, on a past project, we found that there were at least three separate content management systems with their own search engines and various integrations. That led to significant confusion among staff as to where to search for what type of content. The overwhelming sentiment was that they preferred to use external systems to do their research.

Having a number of KM systems with overlapping functions strongly hinders adoption.

It is crucial to gain a solid understanding of all current systems, their functionalities, users, restrictions, as well as where they are in their lifecycle. For example, if your company recently purchased the latest version of SharePoint or Salesforce, chances are good that these systems will make an appearance in your Target State Definition.

### Benchmarking

In addition to the above themes, having a clear picture of how your organization's KM capabilities stack up to the industry can be a valuable tool to inspire support and leadership for your KM transformation effort. To help visualize organizational KM capabilities, at EK we perform a benchmarking analysis of the company's KM maturity based on our proprietary KIM Maturity Model. We utilize a variety of categories to determine the current level of the company's KM maturity compared to industry standards. This approach not only helps you visualize your current KM state, but it also identifies areas where your organization lags behind the industry benchmark, which in turn can spur needed actions.

**Enterprise Knowledge (EK)** is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

Our core services include strategy, design, and development of Knowledge and Information Management systems, with proven approaches for Taxonomy Design, Project Strategy and Road Mapping, Brand and Content Strategy, Change Management and Communication, and Agile Transformation and Facilitation. At the heart of these services, we always focus on working alongside our clients to understand their needs, ensuring we can provide practical and achievable solutions on an iterative, ongoing basis.