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Global Knowledge & Information Management Services

3 Steps to Developing a Practical Knowledge Management Strategy:

Step #2 Define the Target State

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Current State

Target State

You've completed your Current State Assessment and you know exactly and in great detail where your organization is on the KM continuum. Now what? How do you determine where you want your organization to be in terms of KM capabilities? What is realistic? What is achievable?

Enter Target State Definition. At this point of the KM strategy effort, we define the what of the Target State, while we address the how during the Roadmap step.

By now, having a comprehensive understanding of the Current State, you should have spotted some recurring themes across the organization. For example, a common issue we often discover is lack of trust in the enterprise search tool, if one exists. The causes for that are usually multi-faceted and are rarely due to technology issues alone. As we discussed previously, a comprehensive KM strategy touches on much more than just technology. It is vastly unique for each organization. In order to define a practical, realistic, and sustainable Target State, at EK we approach this task in a manner similar to the Current State Assessment. More specifically, we do that by diving into each of the five aspects: people, processes, content, culture, and of course,

technology. These aspects are closely related and we develop them in sync by following several key steps:

- We start by assessing the strengths and weaknesses revealed in the current state map.

- We then balance those against the perceived business needs and wants by determining the areas that would have the biggest business impact with lowest costs.

- Next, we further focus our discussions and explorations on these areas with the greatest need and greatest interest.

- Finally, we address the organization's needs and wants with our best practices experience in KIM to develop an effective and achievable solution that the organization can maintain and grow for the long term.

Working through the above steps, we focus on areas where we have found the greatest potential impact. Below are examples of some of these areas for each of the five aspects:

1. People

As one of the critical pieces for knowledge development and retention, it is important to define a clear target for the human capital of the organization. That includes topics like these:

- **Target level of thought leadership in the organization.** Based on the established goals of the organization, we leverage our experience with similar organizations in that industry to recommend the level of staff coaching, development, and training to establish an optimal degree of thought

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leadership without it negatively impacting productivity.

- **Extent and nature of collaboration.** Influenced by your organization's line of business, collaboration among staff can be achieved in various ways. Here we define the type and level of collaboration that would be most valuable to your organization.

- **Target level of processes and systems adoption.** While it may be tempting to simply state a 100% adoption rate, that may not be reasonable or even needed depending on the organizational needs and environment.

- **Balance between content accessibility and confidentiality protection.** Having analyzed the types of content through the Current State Assessment, we bring our experience with securing content to define roles and access permissions levels to achieve that balance depending on the organization, type of work, and industry.

With a clear picture of what your employees need, how you see their involvement and knowledge management capabilities, it will be easier to form a targeted and achievable roadmap for developing your staff and meeting their KM needs.

2. Processes

As previously discussed, understanding your current processes can identify gaps in data, capabilities, and knowledge acquisition. As part of the Target State, we define which gaps or weaknesses should be addressed. Some areas we consider:

- **Process optimization and automation.** Here we define potential process areas where optimization and automation would bring the most impact to efficiency. A straightforward example here is aiding and simplifying data flow from one system to another, thus eliminating manual data entry and potential for errors.

- **"Unofficial" processes.** There are often "unofficial" process steps needed for staff to complete a task. We consider these gaps and which steps to formally include in the organization processes.

- **Process adoption.** We also evaluate processes that are not being followed, and, depending on the reason, determine whether they should be preserved, improved, or deprecated.

- **New processes.** New processes, as needed, to improve knowledge acquisition and retention. For instance, capturing and sharing all points of contact with a client.

Understanding the current gaps and weaknesses in processes and data and defining your targets are crucial elements to the next step, developing the KM Roadmap. There we define how and when we will achieve these process improvement targets.

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3. Content

Having performed the content analysis piece of the Current State Assessment, we now have a solid understanding of potential gaps in the quality, availability, security, and freshness of content. Here is a sample of critical topics we address in the Target State content strategy:

- **Information integration.** Here we define the information sources that should be integrated and to what level. There could be valid points in keeping certain data segregated, while integrating all other sources. Here, having understood the "why" of existing silos, we can accordingly tackle breaking down the appropriate barriers. And again, this could touch multiple aspects: people (organizational), culture, or technology. We addressed the people aspect above. From an organizational perspective, we look at business unit content and to what extent it is needed throughout other business units. And on the technology side, we recommend potential tools that can index or integrate various content sources and silos.

- **Content confidentiality and access.** Similar to the point we made in the people aspect above, here we define the content types and sources that should be protected and to what level. This

is where a unified user profile and an enterprise-wide access control plan come into play. You do not need to develop the access control plan in detail right now, but you should plan for it as one of the first tasks in the KM strategy roadmap, which we will discuss in the next white paper in this series.

- **Content enrichment.** After planning for the basics of managing your content, we consider the specific benefit of tools and methodologies for enhancing your content and relationships between various pieces with metadata, concept recognition, linking to related concepts, etc. Artificial Intelligence, machine learning, and semantic web concepts are quickly improving and gaining popularity. Implementing an advanced tool with machine learning capabilities could vastly improve your search engine power, ability to automatically identify and suggest semantically related content, and of course introduce features like content auto-tagging, dynamic faceting, smart search auto-complete, etc. While the "how" will be addressed in the Roadmap, here we only need to determine what your Target State looks like.

These are but a few topics we consider when developing your content strategy for the Target State. A few others that we

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explore include knowledge retention practices when staff leaves, internal and external collaboration spaces and management, and backup and recovery capabilities.

4. Culture

Like we discussed in the first paper in this series, company culture shapes how staff perceives and manages organizational knowledge and information. If sharing knowledge and fostering thought leadership are areas that need to be improved, here we define what they look like in your Target State. To help build the cultural aspect of the Target State, we consider these:

- **The "What's in it for me?" factor that hinders sharing.** Here we define the need, type, and level of incentives and potential process tweaks to address such sentiment. Would compensation incentives and rewards work for your organization? If so, what is the cost vs benefit? Conversely, we explore whether thought leadership could be included as part of the performance expectations for certain roles. This is where you need to be creative as one size certainly does not fit all.

- **The "I don't know where/how/what to share and who can see it" factor.** In a previous example we mentioned how multitude of systems with overlapping functionalities can actually be a detriment to content contribution

and sharing. Additionally, not all content may be shareable with all staff. Touching on access control again, we define what needs to be done to enforce it and communicate it. Employees need to be comfortable with the security of their content for content contribution and sharing to be fostered.

- **The leadership support factor.** In our experience, active leadership support is a critical requirement for implementing and maintaining a cohesive and effective KM strategy. With that in mind, in the Target State we define methods that should be implemented to strengthen leadership support for KM processes and tools and to foster knowledge sharing among staff. Some common examples, recognition of thought leaders, budgetary support for information systems implementation, administration, and governances, upholding established content management processes, etc.

The success of any technical solution is highly dependent on the human and culture factor in an organization. Leadership support and guidance is critical for the adoption of enterprise processes and technology. Thus, for your KM strategy to succeed, it must consider enterprise culture and provide methods for actively fostering confidence in the available KM tools as well as trust in the shared information.

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5. Technology

By now, you have probably noticed that while technology is integrated in the above aspects of the KM strategy, it is simply an enabling factor to allow you to achieve better knowledge management. Various tools can address different gaps in the above categories, but how do they all fit together?

At EK, when considering the technology aspect of a KM strategy, we define the information and technical architecture for the organization. We take into consideration any constraints that have already been established and architect the technology ecosystem that will support the targets defined in the above categories. To do that, some of the factors we consider include:

- **Company IT capabilities.** Is there a dedicated IT staff and do they have development capabilities? How comfortable is the organization with customizing tools and platforms, building custom linkages between tools, or even building custom tools? Many platforms nowadays provide out of the box integration functionality that allows them to work well with each other. However, that is not always the case and depending on the set targets, there may be the need for custom development.

- **Preferred technology stack.** We consider existing technologies and preferences, e.g. Microsoft or open source, in order to eliminate clashing tools in the Target State.

- **Existing technology ecosystem and integration capabilities.** An important factor we keep in mind are the already existing tools and platforms and their integration capabilities, for example any available APIs. To develop a practical and cost effective Target State, we focus on leveraging the best of the tools that already exist and ensuring path to integration, thus trending toward less systems rather than more.

- **Technology biases.** An issue we've encountered in some situations is a bias toward or against a specific technology due to past or present issues. Business users may have had a bad experience with a specific platform. Such cases should be taken into consideration even though, with some configuration and customization, that platform may still be a viable solution.

- **User management.** Here we define, for example, whether it is beneficial for the organization to implement an enterprise-wide user account management solution and how single sign-on can be achieved. We also consider whether implementing a universal, searchable

employee profile would address some of the high priority needs of the organization.

- **Enterprise search.** If there isn't a solid enterprise search solution already in place, we define the viability and level of implementation of one to reach as many data sources as possible. Most platforms provide their built in search engines and certain integration capabilities. However, it is worth considering a dedicated search engine tool with much more powerful capabilities and integration options.

- **Advanced technologies.** Depending on the maturity level of the organization in all aspects, cutting edge tools like semantic web and machine learning/AI could truly take enterprise knowledge to the next level with content augmentation, auto tagging, concept identification and linking, and so on.

All these considerations can quickly become overwhelming when one attempts to achieve it all in one go. At EK, we utilize our proven approach of breaking it up in manageable iterations to provide quick value and continuous improvement throughout the implementation effort. We will address methods to alleviate the burden and ease the transition in the next white paper focused on developing the Roadmap.

Benchmarking

Having constructed the Target State vision, we revisit the Current State benchmarks we established earlier for each of the categories relevant to the organization. With that in mind, we then help the organization envision the impacts of achieving the defined Target State in each of these categories. For instance, an organization we worked with recently had scored a 2 (out of 5) in the Search category for its Current State due to their multiple and segmented search capabilities. Understanding their actual search needs, leveraging the strengths of their existing platforms, and applying our proven enterprise search best practices, we helped the organization score a 5 in that category.
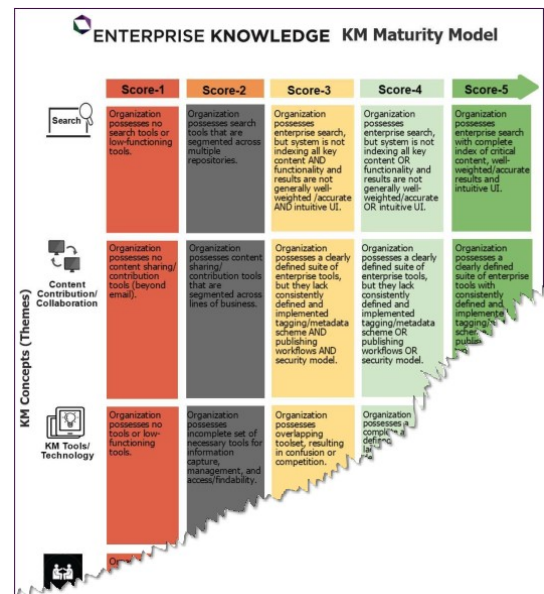
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By implementing the recommended integrated enterprise search that indexes critical content and produces accurate results with an intuitive interface, we helped the organization increase user confidence, enthusiasm, and willingness to share.

Utilizing the KIM maturity model, we can clearly visualize the intended improvement in the various aspects included in the benchmark. Each node in our benchmark scale depicts the state of the specific KIM capability which allows us to easily show the impact and level of improvement that the Target State could achieve for that capability. This in itself is a powerful tool to help obtain executive buy-in and support for the implementation phase.

Concluding Remarks

While there are three distinct steps in developing a KM strategy, namely Current State, Target State, and Roadmap, they all evolve hand in hand. While you work on understanding your Current State, you already start forming an idea for the Target State. And while defining the Target State, you unavoidably think of how to achieve it, i.e., the

Roadmap. In our next white paper in this series, we will discuss our guiding principles in developing a detailed, customized and practical KM Roadmap to help you achieve your Target State.

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.

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