

Beyond the Needs Assessment

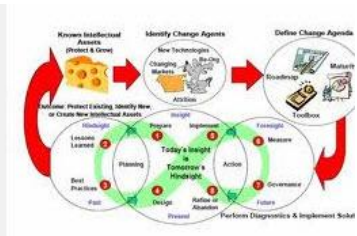
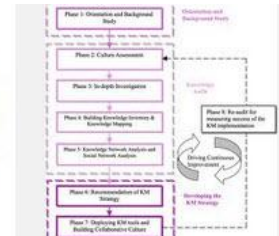
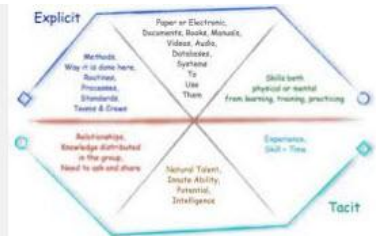
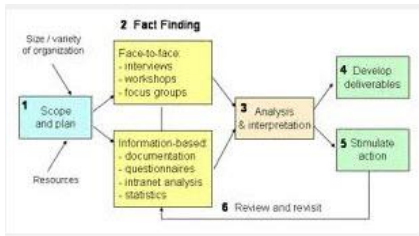
SLA San Diego Fall Seminar 2013

How a Knowledge Audit Informs Strategic Planning

October 4, 2013

Cindy Shamel

As Simple as 1-2-3



PCCE Mathematics K12 & K16 Subject Knowledge Audit

Year	Math	Science	History	Language Arts	Art	Music	Physical Education	Health	Career/Technical Education
Grade 1									
Grade 2									
Grade 3									
Grade 4									
Grade 5									
Grade 6									
Grade 7									
Grade 8									
Grade 9									
Grade 10									
Grade 11									
Grade 12									

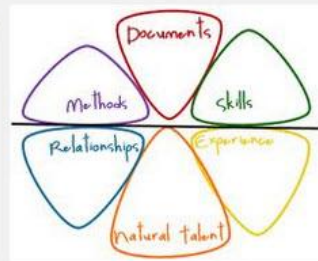
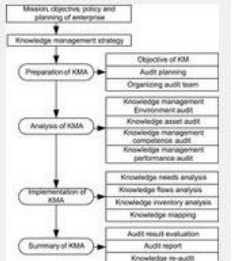


Figure 1: Questions to ask in a knowledge audit

<p>What makes these contract types:</p> <ul style="list-style-type: none"> • Relevant? • Interesting? • Valuable? • Important? 	<p>How do they originate?</p> <ul style="list-style-type: none"> • People? • Teams? • Third parties?
<p>How are the terms and conditions spread/shared?</p> <ul style="list-style-type: none"> • Company rules? • Processes? • Optimized experience? • Solving problems? • Systems? 	<p>Are they still relevant or appropriate?</p> <ul style="list-style-type: none"> • How old are they? • What were the circumstances (context) when they were negotiated? • Do they still hold true or apply?

PCCE Science Subject Knowledge Audit

Year	Math	Science	History	Language Arts	Art	Music	Physical Education	Health	Career/Technical Education
Grade 1									
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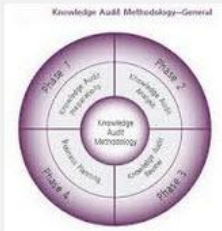


Activity Based Knowledge (ABK) Simulator

Knowledge Types	Key Activity / Task / Process	Outputs
Procedures, protocols, manuals, checklists, SOPs, work instructions, training materials, etc.	Knowledge capture, documentation, review, update, maintenance, etc.	Updated documents, manuals, etc.
Skills and Expertise	Knowledge capture, documentation, review, update, maintenance, etc.	Updated skills, expertise, etc.
Relationships	Knowledge capture, documentation, review, update, maintenance, etc.	Updated relationships, etc.
Tools and Applications	Knowledge capture, documentation, review, update, maintenance, etc.	Updated tools, applications, etc.
Processes and Procedures	Knowledge capture, documentation, review, update, maintenance, etc.	Updated processes, procedures, etc.
Information and Data	Knowledge capture, documentation, review, update, maintenance, etc.	Updated information, data, etc.

KNOWLEDGE AUDIT

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Bottom Line Up Front

- The knowledge audit offers an opportunity
 - To help your organization succeed
 - For you to lead the way



Definitions

No widely adopted definitions

KM – applying a **system** to the organization of knowledge resources found in people (tacit) and in objects (explicit)

KA – determination and evaluation of **how** and **where** knowledge is used in business processes

Phrase Mentions

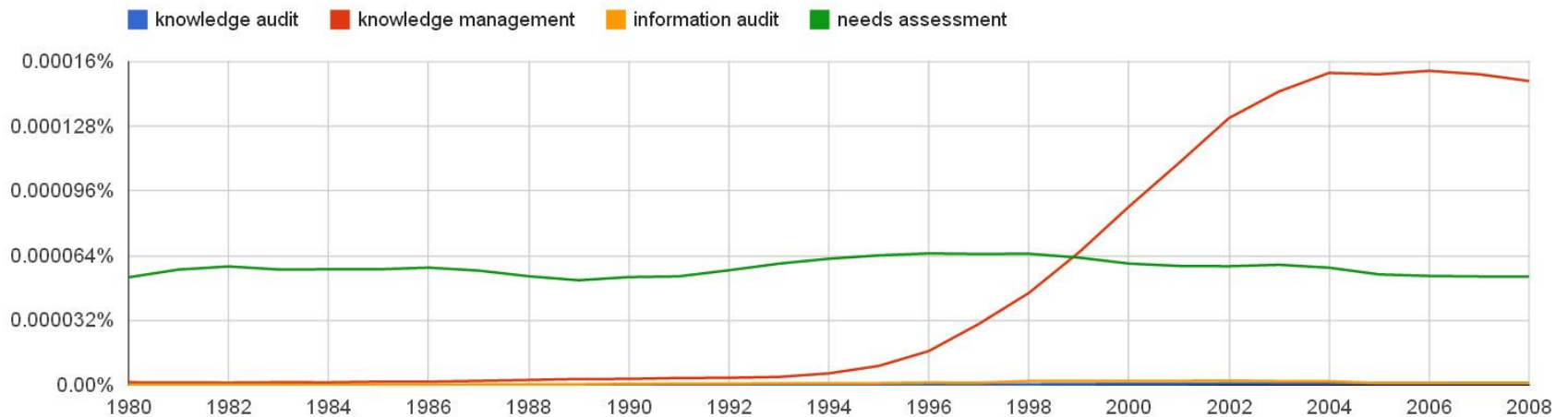
Google books Ngram Viewer

Graph these **case-sensitive** comma-separated phrases:

between and from the corpus with smoothing of .

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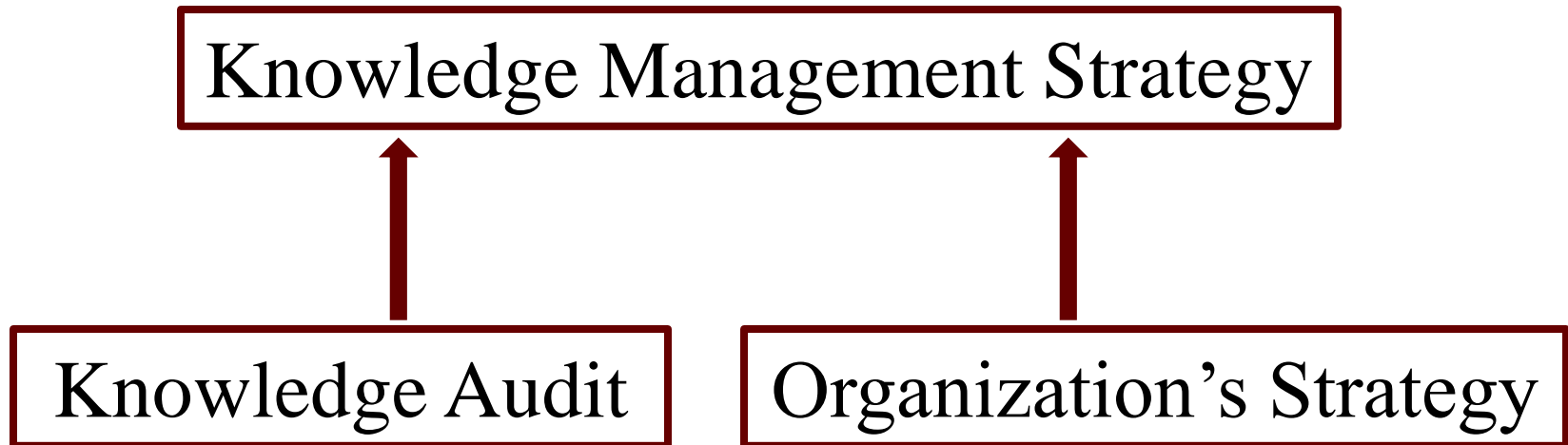


Needs vs Information vs Knowledge

- **Needs Assessment** is reactive – finding out what people need to do their jobs
- **Information Audit** is proactive – evaluating information content and flows
- **Knowledge Audit** is interactive – understanding attitudes and priorities related to tacit and explicit knowledge and its role in advancing the organization's goals

Based on work by Dale Stanley and Guy St. Clair

Where does strategy come in?



Trigger

- What prompts a knowledge audit?
 - Precursor to a KM project
 - Response to an internal problem or challenge
 - Personal recognition of need
- Caution! The trigger does not always point directly to the outcome.

Organization Strategy - One

Organization: 22 year old diagnostics company with just over 700 employees

Strategy: Pursue an aggressive patent strategy; pursue acquisitions; expand collaborations (2005 annual report)

Trigger, Findings, Outcome - One

- The Board of Directors says we have to do a better job of monitoring the competition – project sponsor suggests “a database”
- Findings
 - Silos, silos everywhere | Multiple local solutions
 - Intellectual property risks
- Centralize information management to meet needs and leverage local solutions

Organization Strategy - Two

Organization: 54 year old medical research institution with approximately 250 military and civilian employees

Strategy: Deliver quality, implementable, relevant work to maintain a continuous revenue stream through successful competition for awards

Trigger, Findings, Outcome - Two

- Do we really need all of these databases?
Sponsor suggests sharing with other entities.
- Findings
 - Resources selected are on target
 - Spending is about what you would expect
 - Delivery is a major weakness
- New delivery platform, some duplication to address, better oversight of services

How to Approach an KA Initiative

- Define the question – what problem do you seek to address
- Identify human resources – do it yourself, assemble an internal team, bring in a consultant
- Muster the resources – financial, time, and support

Process or Methodology

- ❑ Understand the trigger
- ❑ Understand current conditions
- ❑ Talk to knowledge workers
- ❑ Understand actual challenge or problem
- ❑ Analyze options
- ❑ Prepare recommendations with a plan to execute

Case Study – Corporate Strategy

Hotel company w/ 4,600 hotels in 100 countries

- Strategy has 7 components including:
 - Build preferred brands by understanding our guests
 - Support franchise owners with best-in-class marketing and technology
 - Build in developed and emerging markets

Case Study

- Trigger – populate the portal
- Approach – consultant managed by the internal KM Champion
- Process
 - Identify key knowledge workers and interview them to find content and understand practices
 - Develop a plan for collecting and moving content to portal

Process and Findings

- ❑ 86 interviews including over 100 employees across the globe
- ❑ Very little shareable content identified – most was team, brand, or geographically specific
- ❑ Strong corporate culture for sharing
- ❑ Procurement not able to track spending
- ❑ Widespread frustration with current ‘finding’ tools
 - Trouble identifying internal experts to talk to
 - Dissatisfaction with current intranet
 - Recognized lack of internal social networking tools

3-Yr Plan: Prioritize and Scale Up

Year 1: Baseline

Year 2: Build

Year 3: Strengthen & Win

Define/Support Role of KM Team – visits; training; refine services

Staff the KM Team Appropriately – hire analyst; empower KM mgr; reassess

Support/Reward the Knowledge Culture – KM advisory group; KPIs; awards

Streamline & Consolidate Procurement – coding; vendor coord; reexamine

Build a Knowledge Map – determine structure; beta version; refine (experts)

Define Portal Content – empower curator; link to existing nodes; collaborate

Enhance Portal Usability – consider taxonomy; users group; test usability

Develop Portal Awareness – naming; training tools; assess

Aligning KM with Org Strategy

- Diagnostics company better positioned to monitor the competition, manage intellectual property, and inform acquisitions and collaborations
- Military library maximizing service to research scientists to support good science producing implementable, relevant work
- Hotel corporation leveraging internal resources to support brand development, marketing decisions, and new market development

Who Pulls the Trigger?

- ❑ **Managers** – top down approach, recognize that something needs to be done
- ❑ **Info pros** – well positioned to see the need and identify solutions
- ❑ **Knowledge gurus** – will seek forgiveness rather than permission

Where does a knowledge audit fit into your knowledge management strategy?

Know where you're going and plan how to get there.

- ✓ Look for triggers
- ✓ Consider your approach
- ✓ Follow the process
 - ✓ Start small, scale up
 - ✓ Prioritize

Lead the way!





Questions?

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