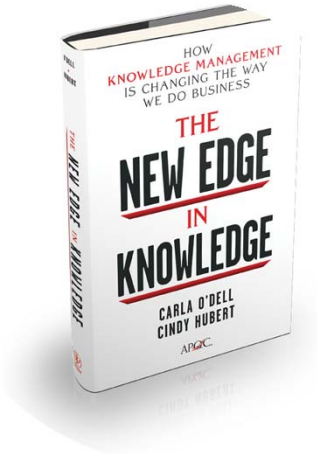
The world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management.

STRATEGIC PLANNING FOR KNOWLEDGE MANAGEMENT

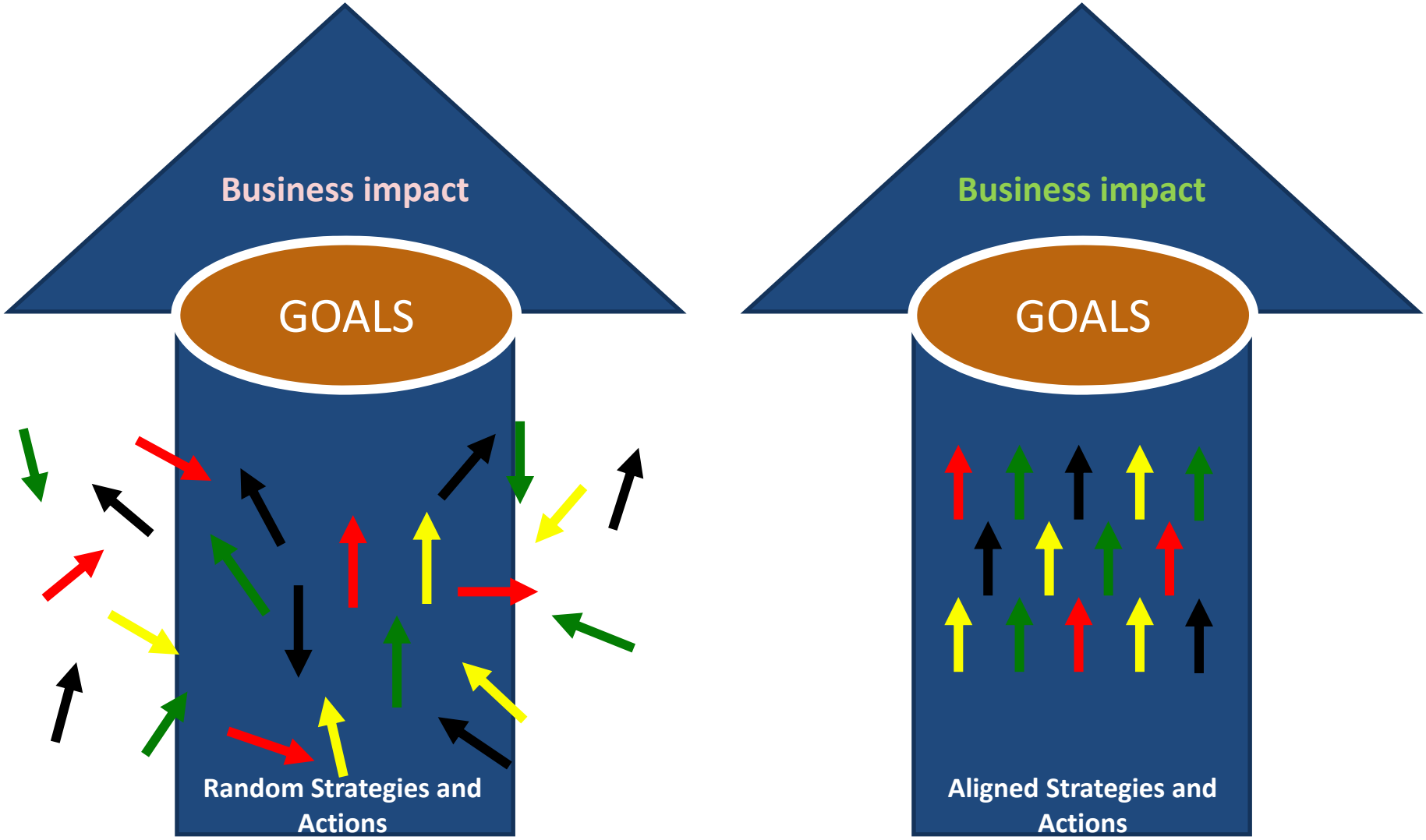


Cindy Hubert, Executive Director

Twitter: Chubert_apqc

Tuesday, April 17, 2018

WHY WE DO STRATEGIC PLANNING



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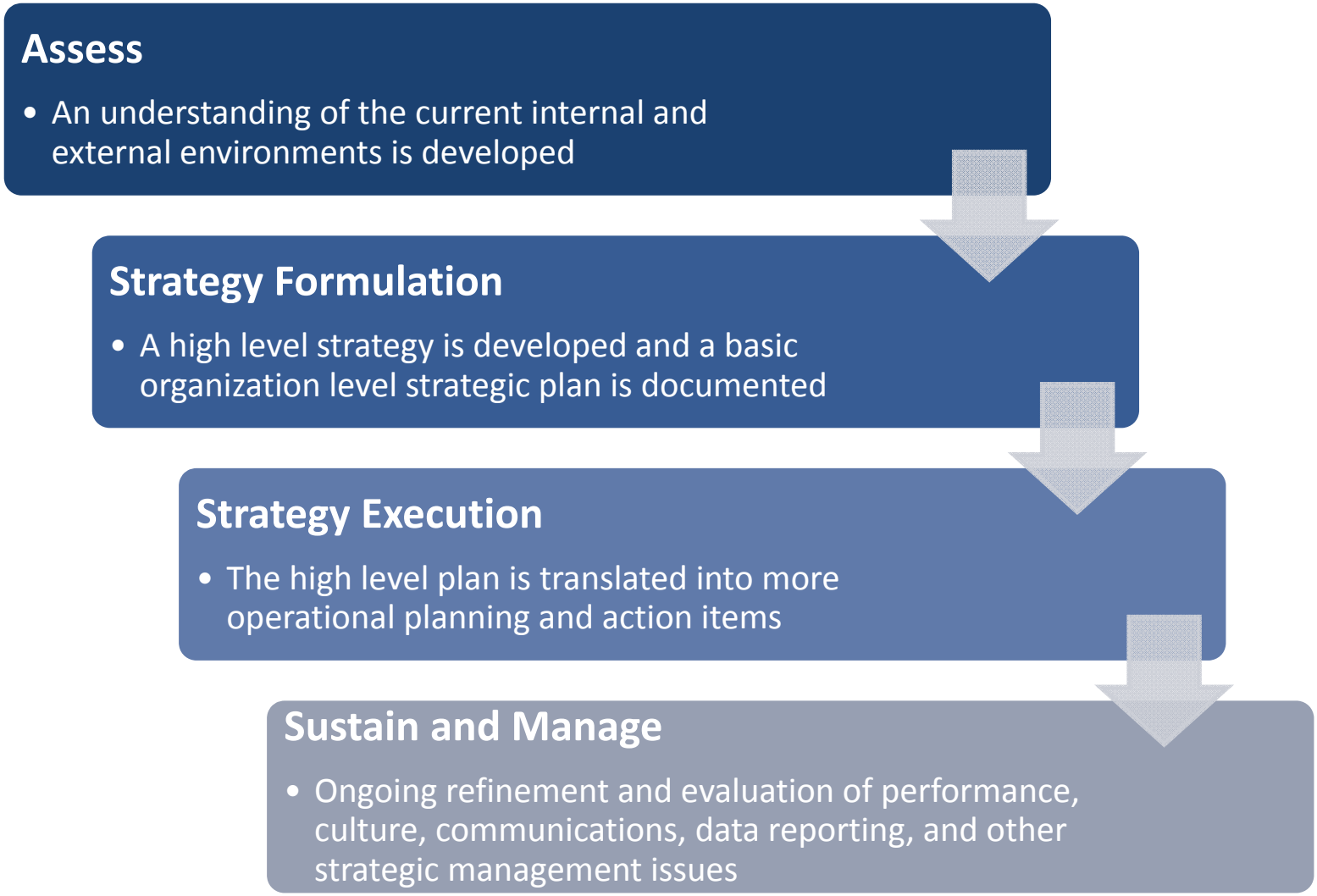
METHODOLOGY FOR STRATEGIC PLANNING



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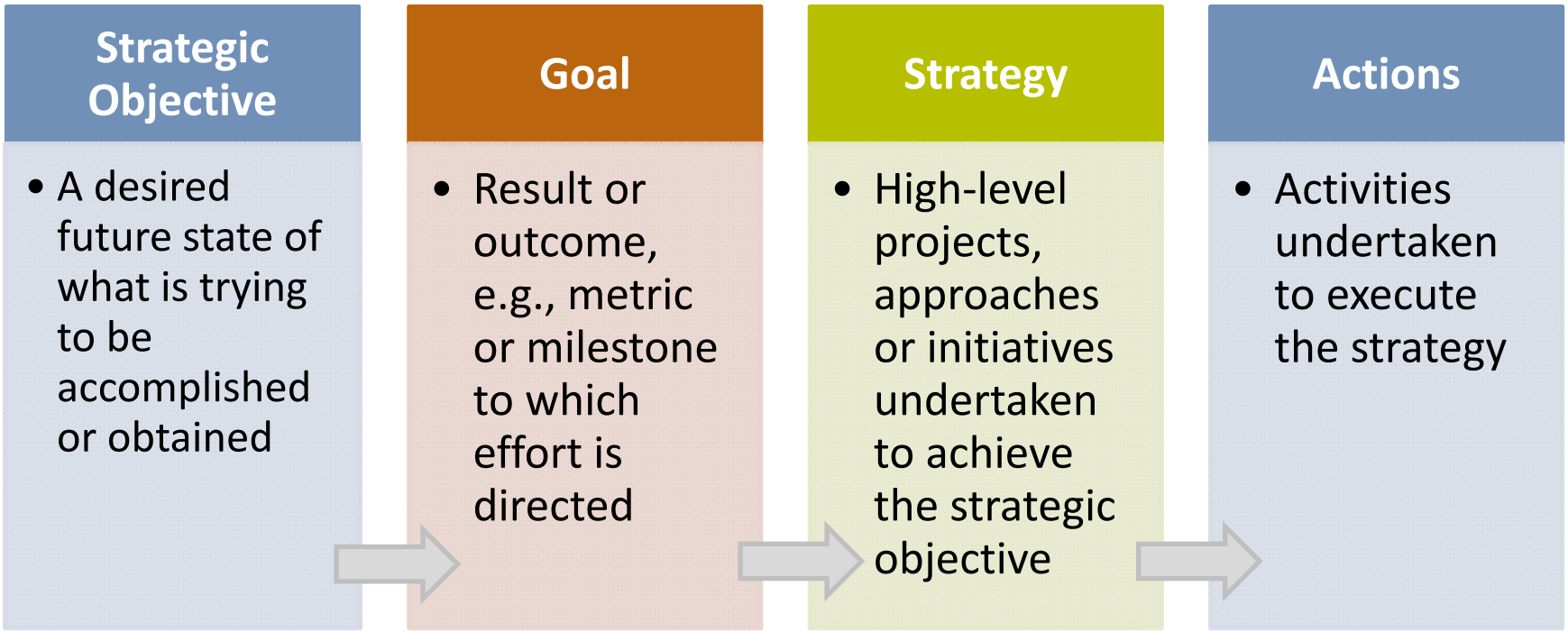
COMMON TERMS IN STRATEGIC PLANNING



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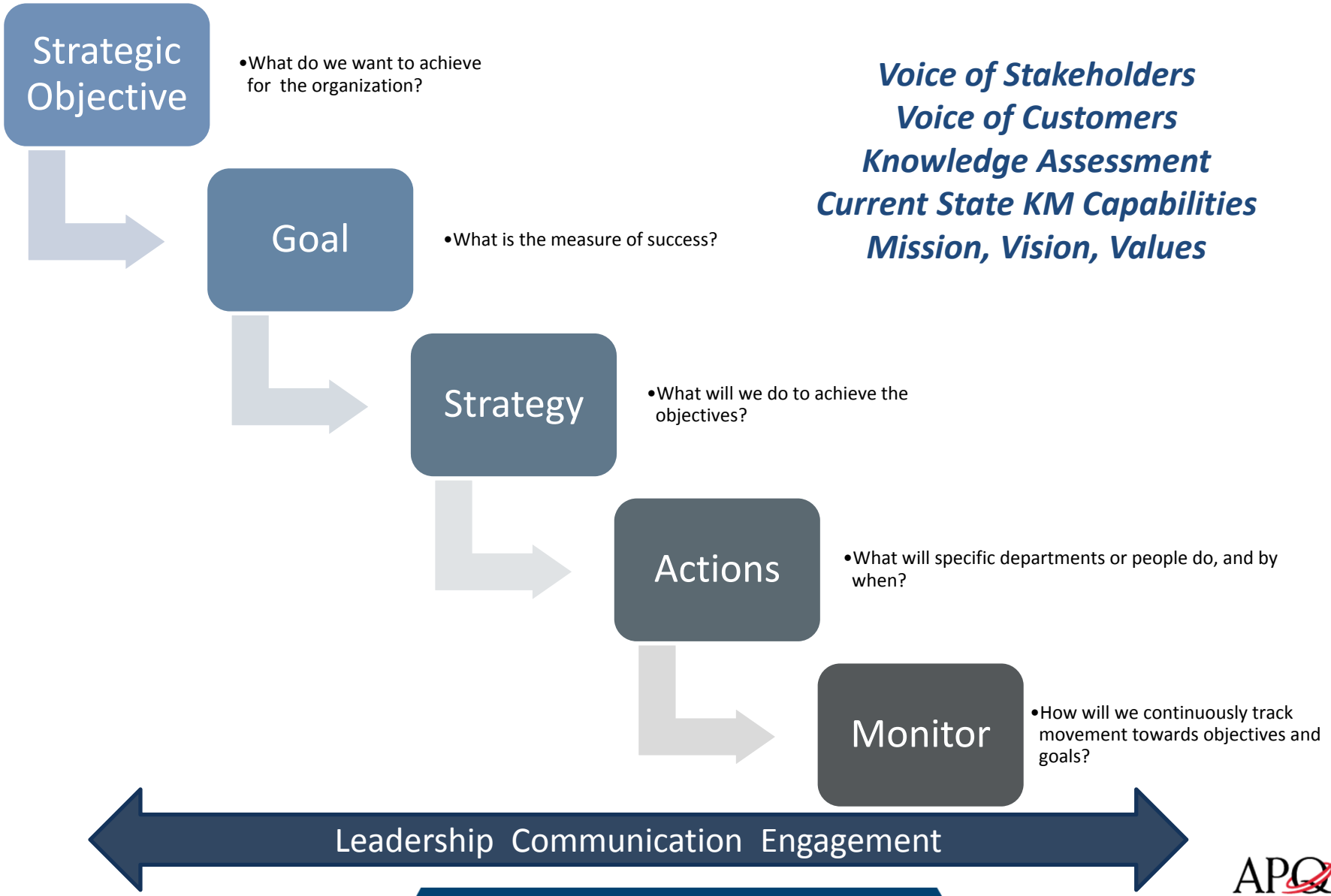
STRATEGIC PLANNING FRAMEWORK



Voice of Stakeholders
Voice of Customers
Knowledge Assessment
Current State KM Capabilities
Mission, Vision, Values

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PREPARE FOR STRATEGIC PLANNING

ENGAGEMENT IN STRATEGY DEVELOPMENT AND EXECUTION

The Right People *ACTION* *Milestones & Measures*

Alignment Agility Accountability

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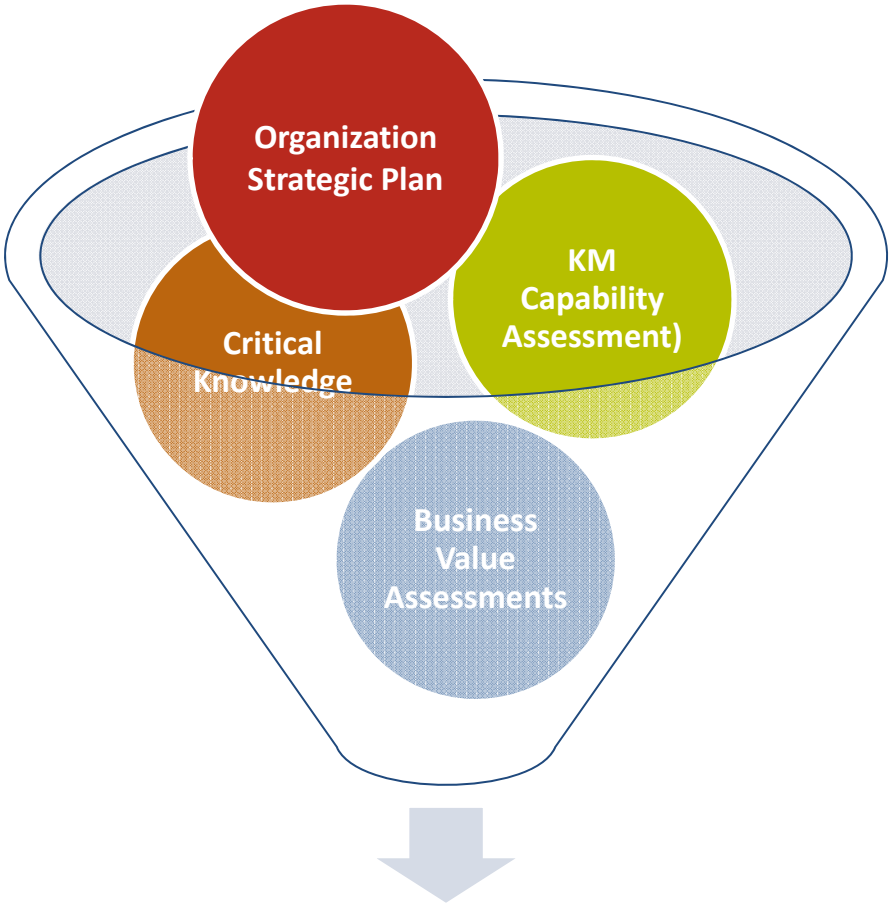
WHAT IS NEEDED FOR STRATEGIC PLANNING



Knowledge Management Strategy

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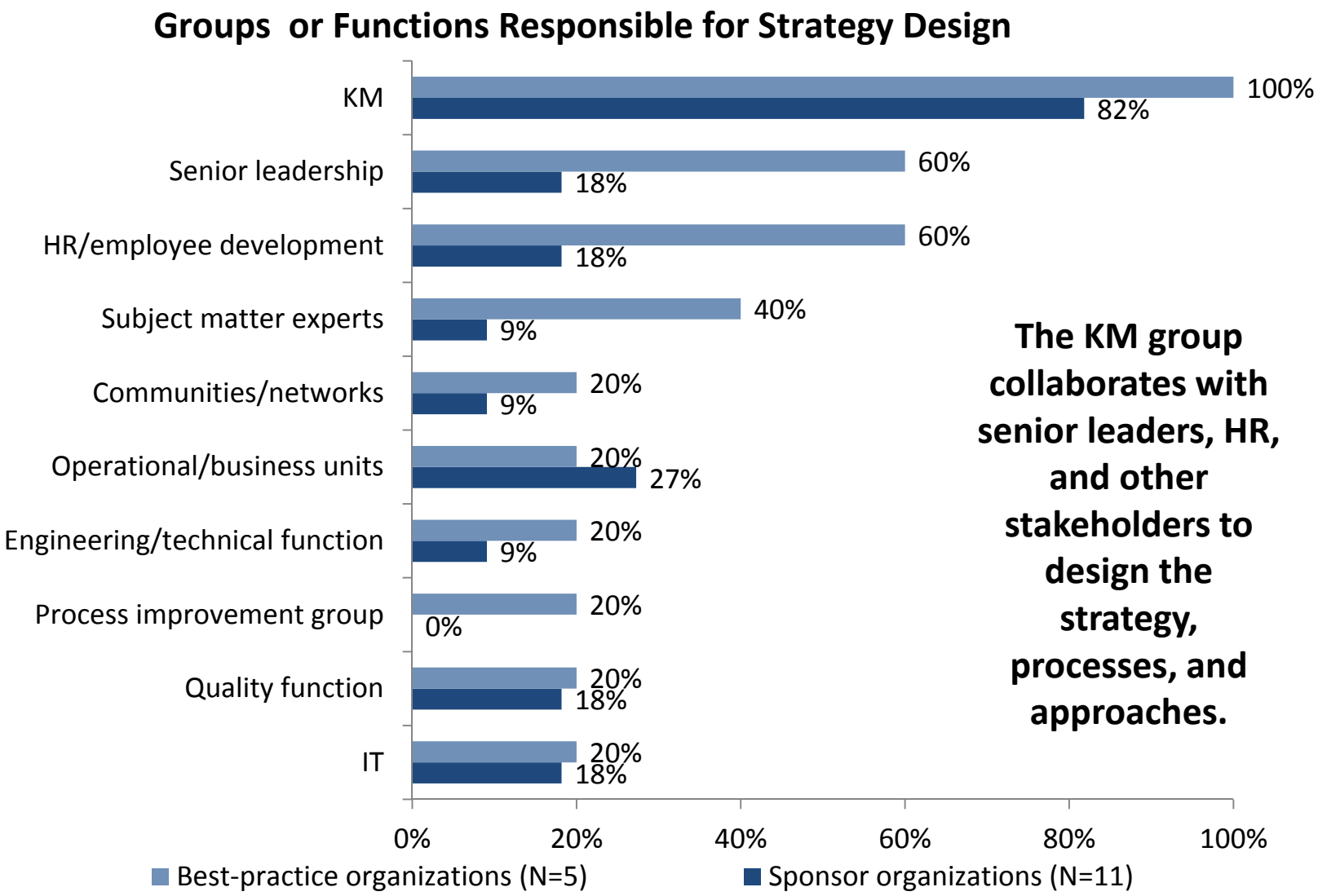
BUSINESS LEADERS DRIVE THE STRATEGY



The KM group collaborates with senior leaders, HR, and other stakeholders to design the strategy, processes, and approaches.

Source: Approaches to Address Classic Knowledge Management Needs (Collection)

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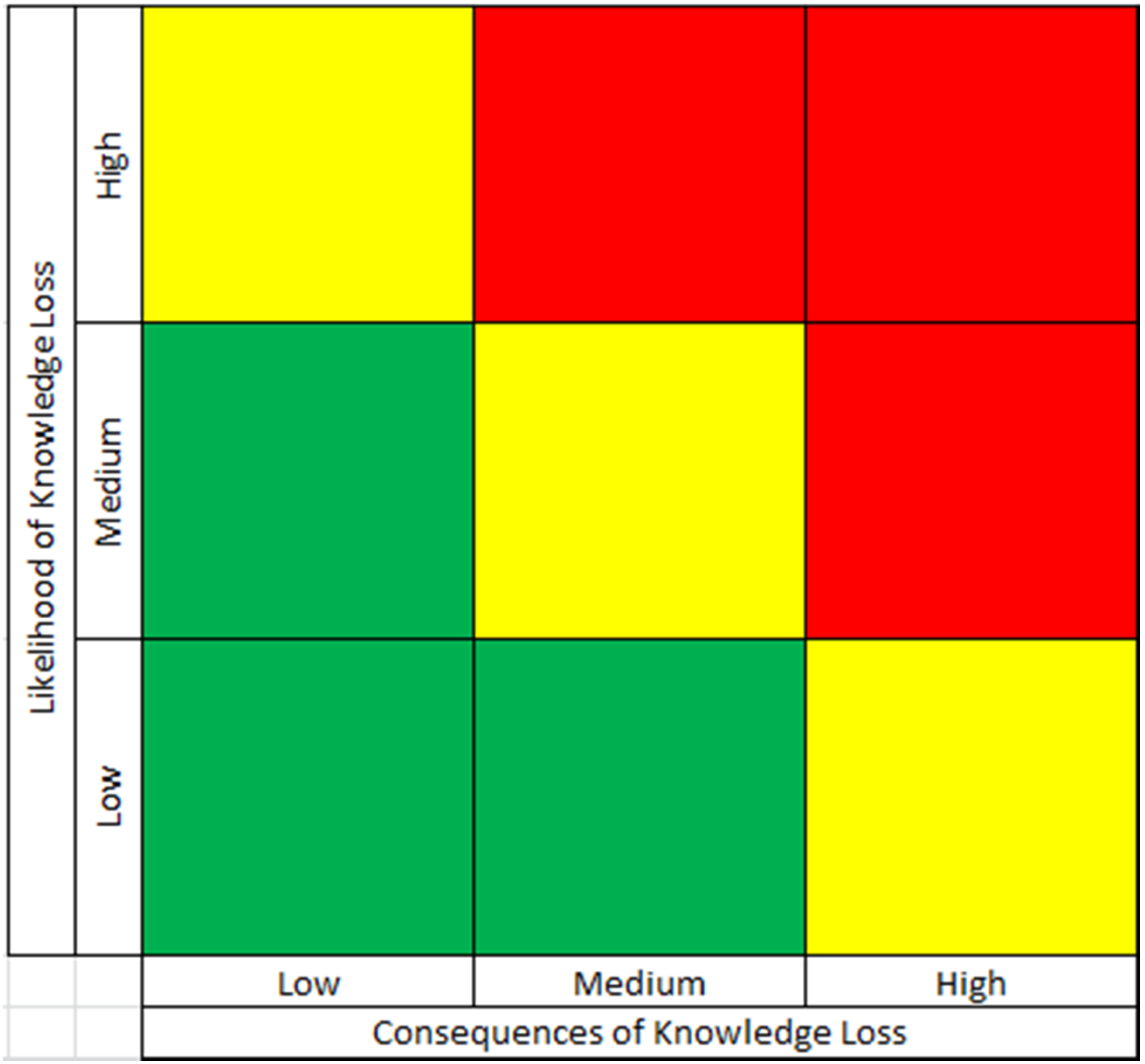
KNOWLEDGE LOSS RISK MATRIX



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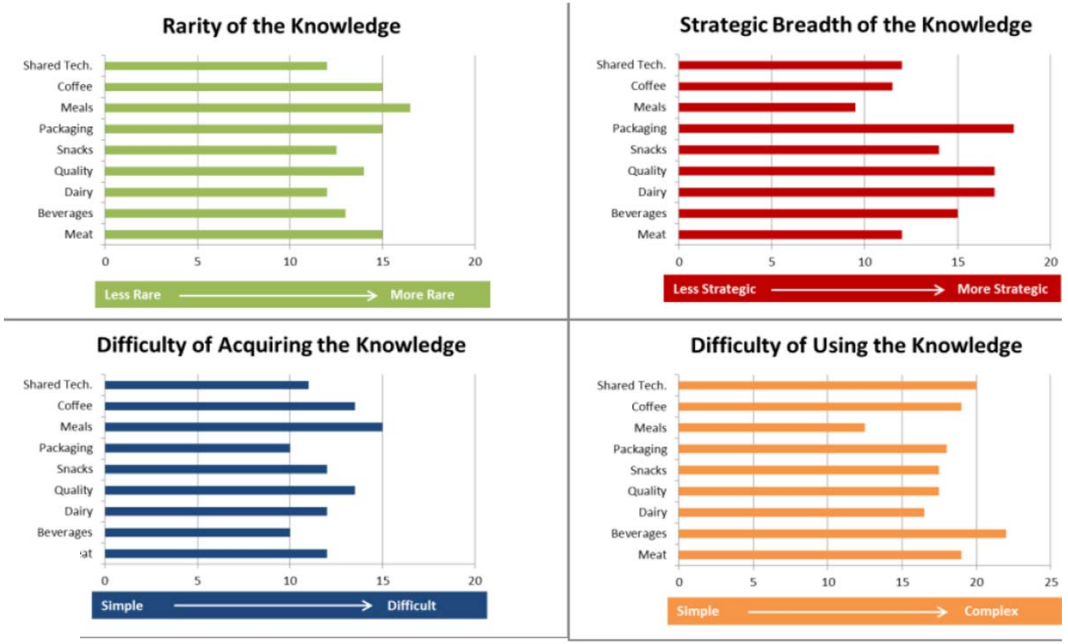
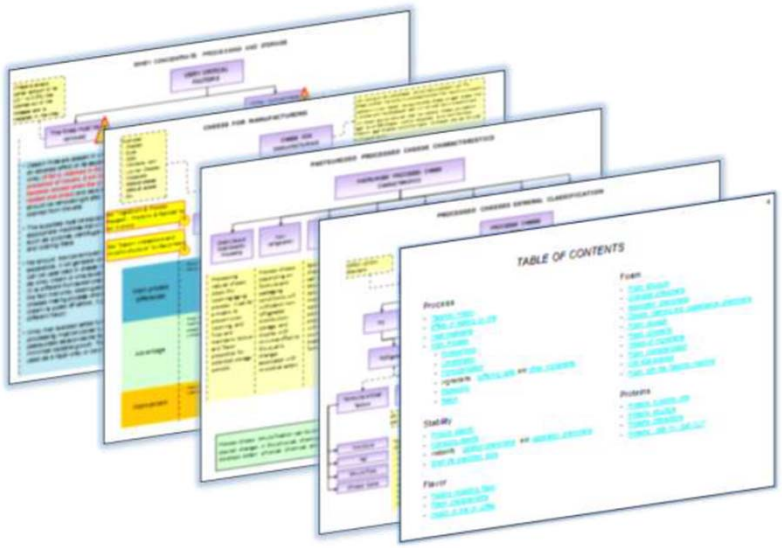
EXAMPLE: KRAFT FOODS

Business unit VPs suggest fields of knowledge to capture, then the KM team analyzes and prioritizes the recommendations





Knowledge elicited through in-depth interviews is captured in knowledge books that are visual, interactive, and based on familiar technology (PowerPoint)

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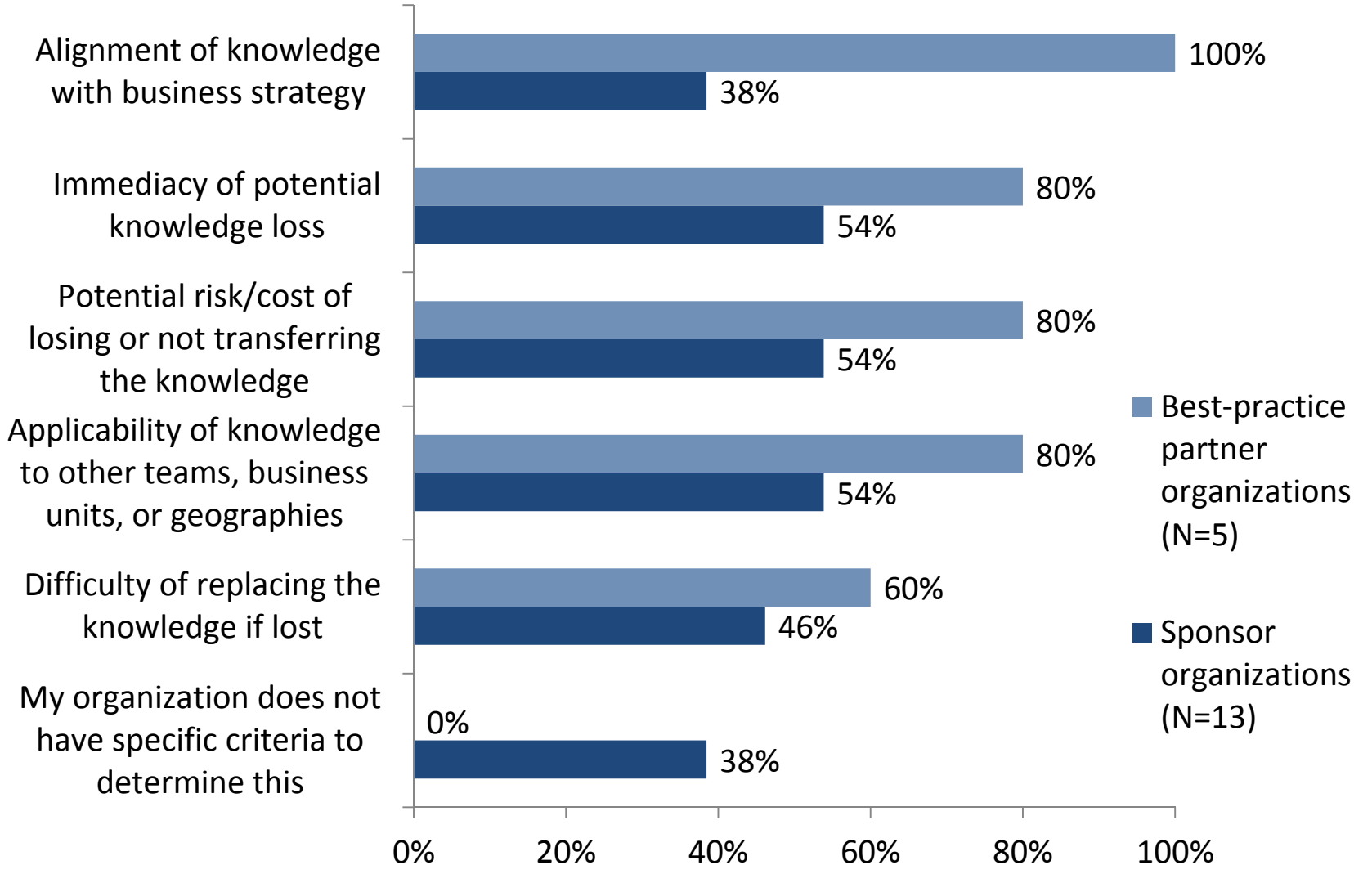
CRITERIA TO IDENTIFY CRITICAL KNOWLEDGE



Source: Approaches to Address Classic Knowledge Management Needs (Collection)

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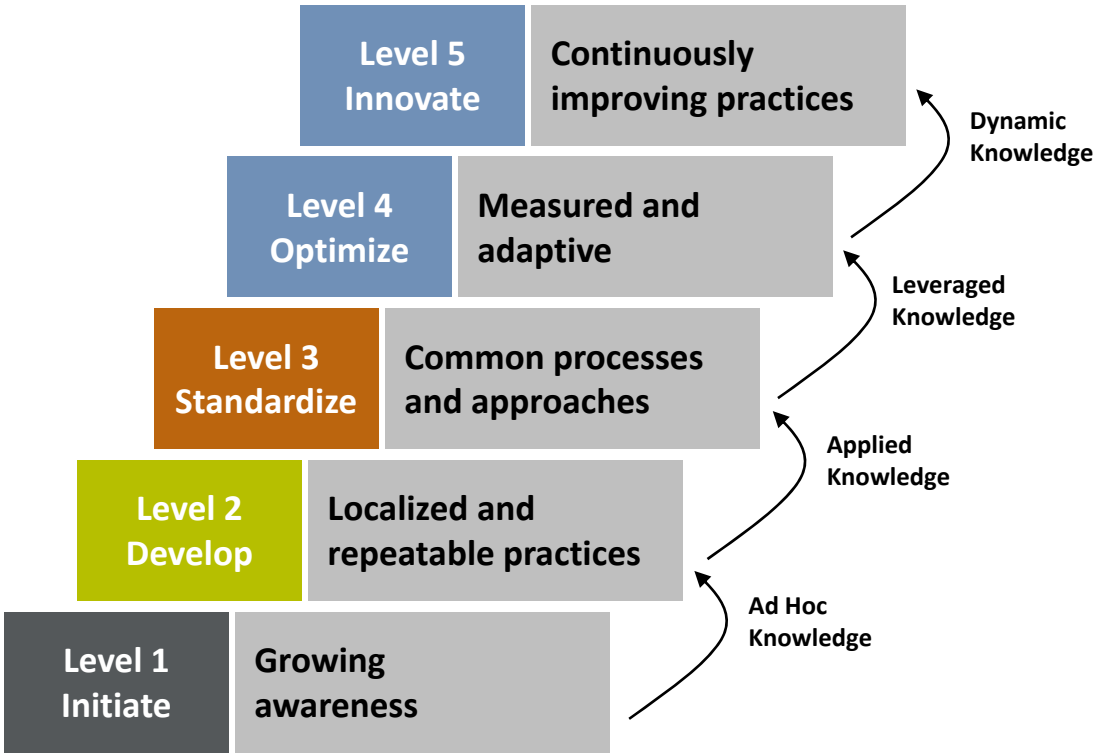
APQC LEVELS OF KM MATURITY℠

Five-step maturity model that defines the status of a KM program



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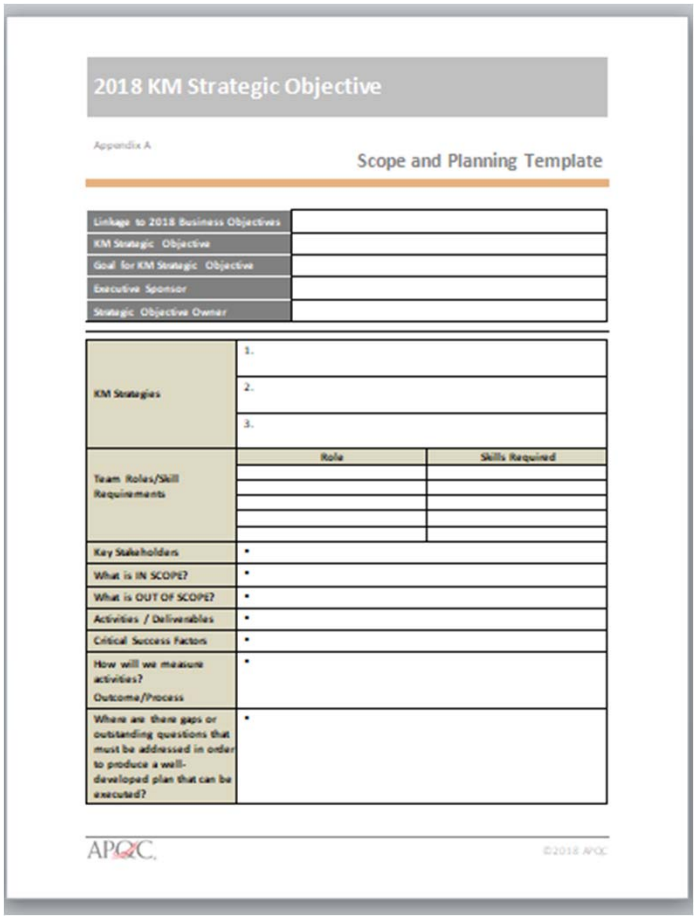
DEVELOP A STRATEGIC PLAN FOR KM

Key Steps

Setting Strategic Objectives and Goals

STRATEGIC SCOPE & PLANNING TEMPLATE



2018 KM Strategic Objective

Appendix A

Scope and Planning Template

Linkage to 2018 Business Objectives	
KM Strategic Objective	
Goal for KM Strategic Objective	
Executive Sponsor	
Strategic Objective Owner	

KM Strategies	1. 2. 3.	
Team Roles/Skill Requirements	Role	Skills Required
Key Stakeholders	•	
What is IN SCOPE?	•	
What is OUT OF SCOPE?	•	
Activities / Deliverables	•	
Critical Success Factors	•	
How will we measure activities? Outcome/Process	•	
Where are there gaps or outstanding questions that must be addressed in order to produce a well-developed plan that can be executed?	•	

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KEY ACTIVITIES FOR STRATEGIC PLANNING FOR KM

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COMMON KM OBJECTIVES

- Retain valuable enterprise knowledge
- Capture and transfer critical knowledge
- Enhance enterprise collaboration
- Use knowledge to improve quality of project deliverables
- Mitigate enterprise risk by protecting critical knowledge
- Increase operational efficiencies by making knowledge accessible and encouraging its reuse
- Support employee learning and development
- Make it easy to access content and knowledge

• Establish strategic objectives and goals for KM

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“SMART” GOALS

Attribute	Description
S	Specific - The goal must clearly state **what** is to be achieved, by **whom**, **where** and **when** it is to be achieved
M	Measureable - Measurability applies to both the end result and the milestones along the way to attaining a goal. It answers the question of quantity – how much, how often, how many?
A	Attainable - Ensure that the goals set are achievable.
R	Relevant - Goals must be relevant to what you want to achieve in the short term and the long term.
T	Time-based - Put a time-frame to the goal.

- Establish strategic objectives and goals for KM

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KM Strategy Goals & Objectives

- **Strengthen MITRE's person-to-person knowledge transfer ability**
  - **Enable the enterprise through improved ability to network and collaborate within and beyond MITRE**
- **Assure the efficient findability of knowledge critical to MITRE performance**
  - **Enhance knowledge worker effectiveness by increasing the ease, assurance, and accuracy of locating critical knowledge**
- **Anticipate and deliver needed information**
  - **Deliver timely and targeted information to help staff manage their information flow; include enterprise partners in information access and delivery**
- **Strengthen knowledge capture and re-use practices**
  - **Corporate and Center leadership improve MITRE knowledge capture, sharing, and re-use to bring the corporation to bear**

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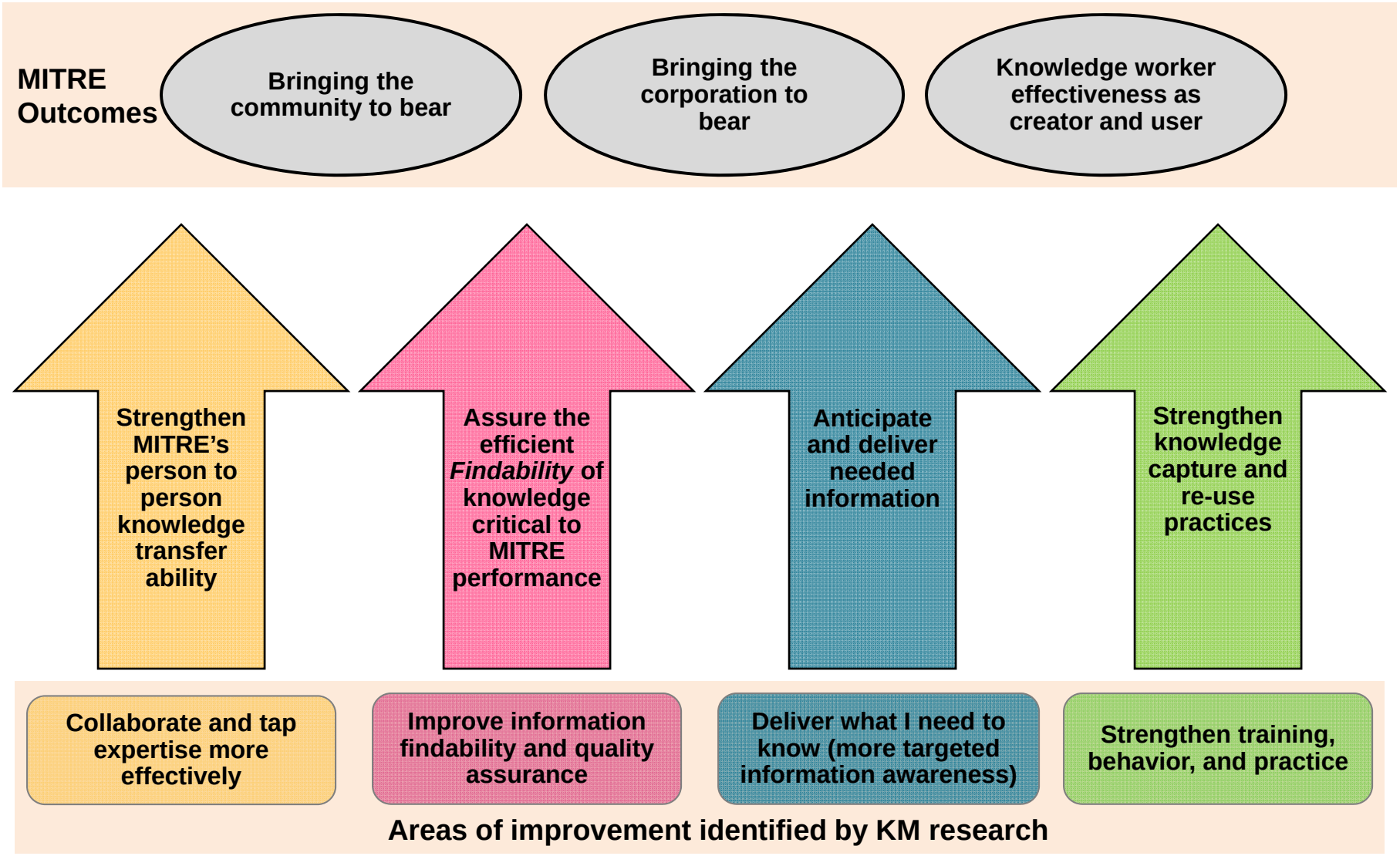
KM Strategy



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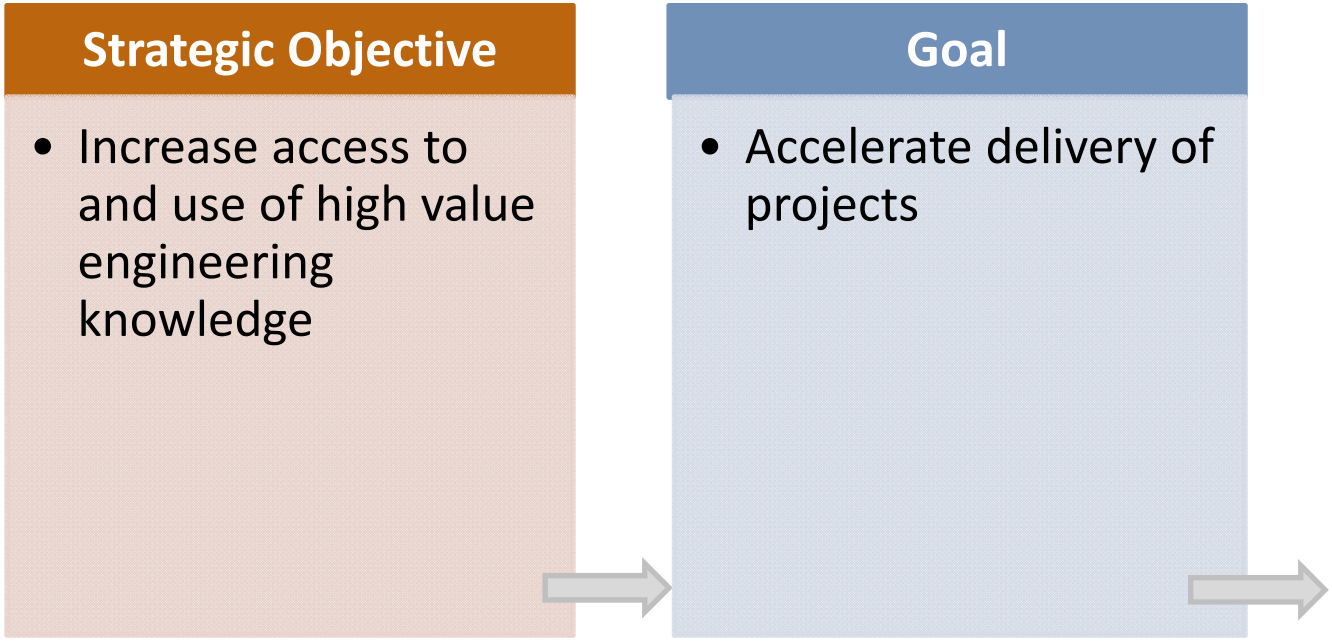
GROUP DISCUSSION

What are some potential strategies that help you achieve the objective?



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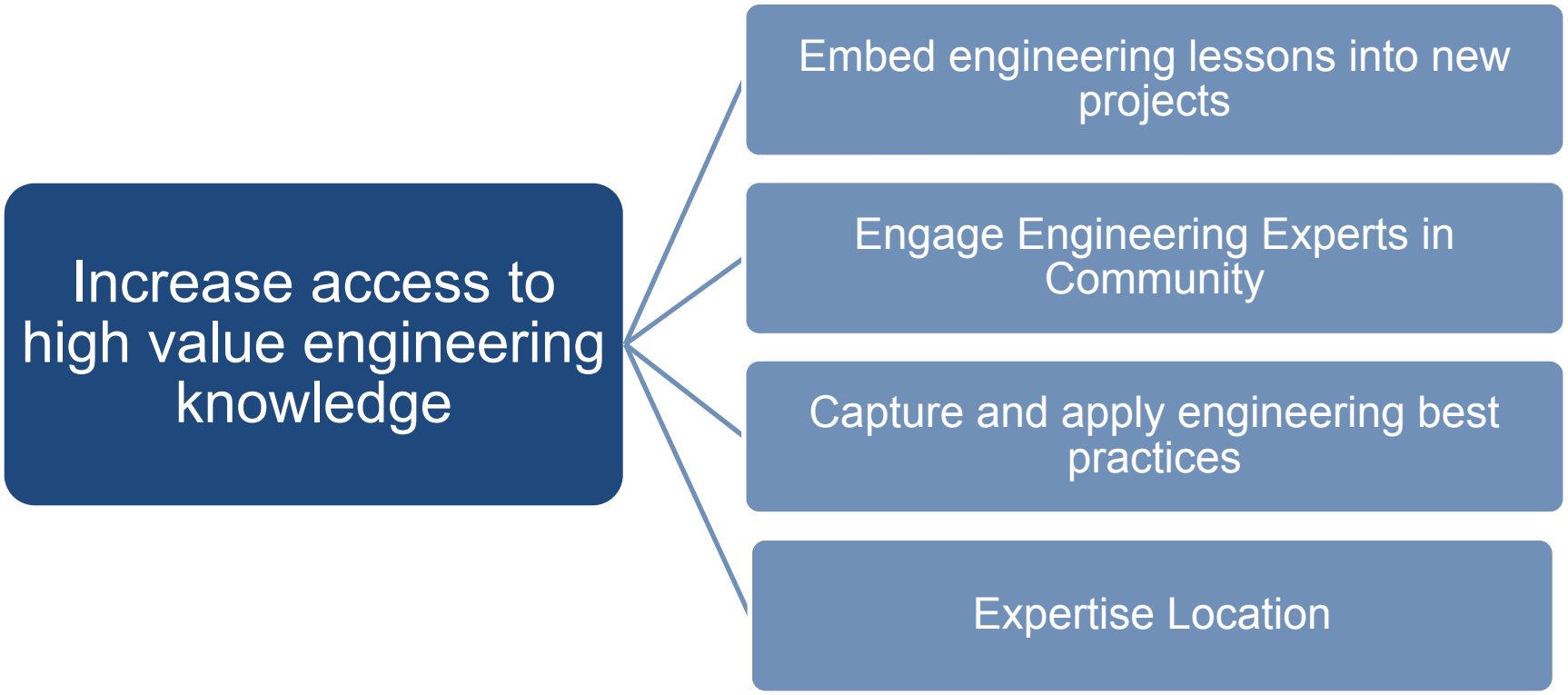
KM STRATEGIES

Initiatives and/or approaches undertaken to achieve a strategic objective



- Identify strategies

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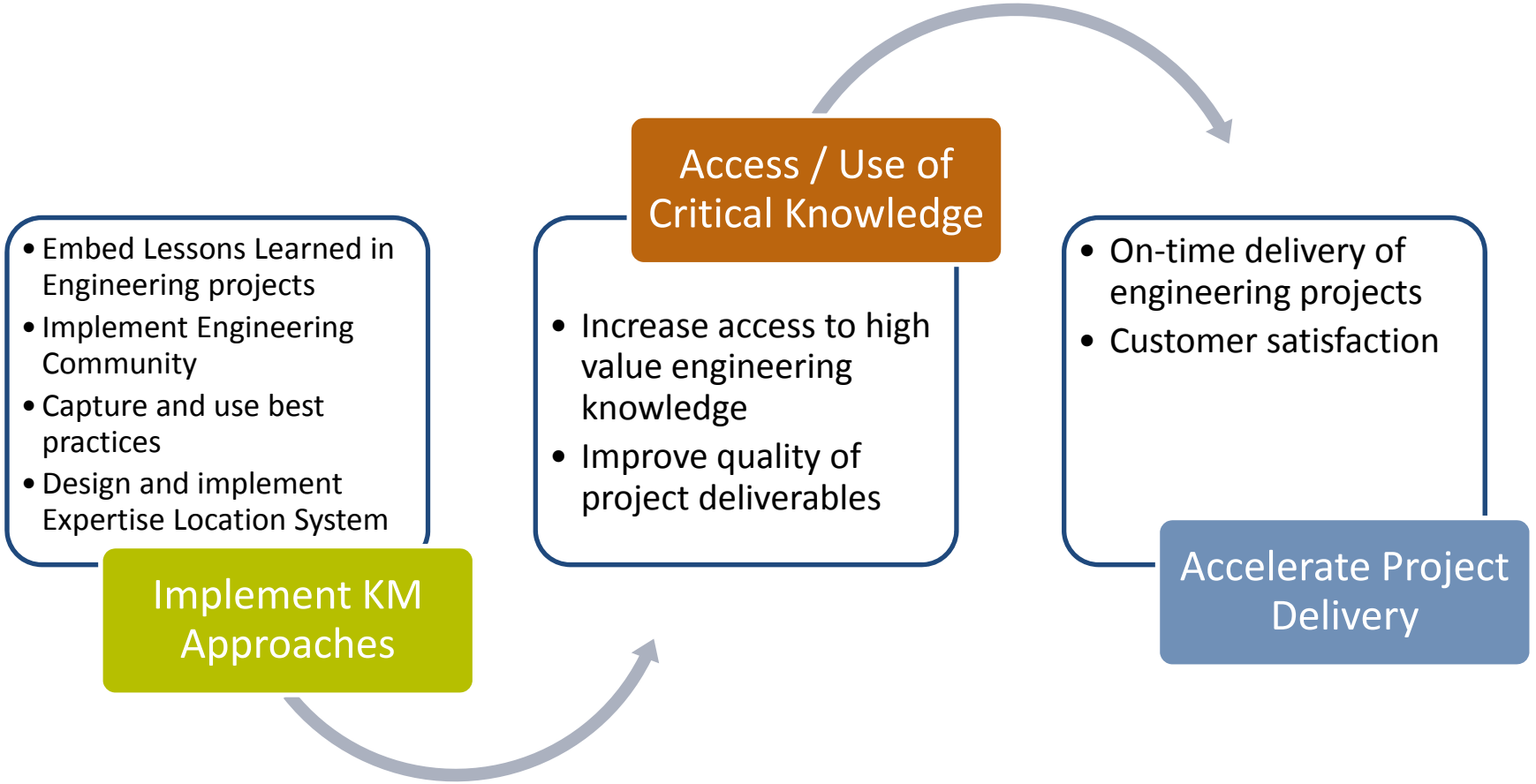
LINK THE ACTIVITIES TO THE DESIRED OUTCOMES



- Establish strategic objectives and goals for KM

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ACTIONS

- Activities undertaken to execute a strategy

Embed Engineering Lessons	• Create a knowledge map of engineering processes in scope • Identify knowledge gaps and how lessons could support • Follow Lessons Learned processes (per KM standard approaches)
Engage Experts in Community	• Identify tacit knowledge needs (using knowledge map) • Update Engineering Community charter • Develop a roles and accountability matrix
Capture and Apply Best Practices	• Leverage best practice transfer process • Develop a small design group to embed process into business work flow • Develop criteria for identifying and applying best practices • Develop repository for best practices
Expertise Location	• Understand current needs / problems for finding expertise • Develop scope for Expertise Location strategy • Develop processes • Enable with tools

• Identify actions to execute strategy

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STRATEGY REQUIREMENTS

CONFIRM SCOPE

You'll need to confirm what is or is not in scope for each strategy. Here are some examples of the types of decisions you may have to make.

- Area of focus
  - Business Unit
  - Functional area
  - Enterprise-wide
- Technology
  - Build
  - Buy
  - Leverage
- Process
  - End-to-end cross-functional process
  - Functional process

- Confirm scope for each strategy

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DEFINE ROLES AND SKILL REQUIREMENTS

	Roles/Skills	Team Member(s)
Team Roles/Skills Requirements	Strategy Sponsor	
	Strategic Planning Team	
	Strategic Execution Team	
	TBD	

- Define roles and skills requirements

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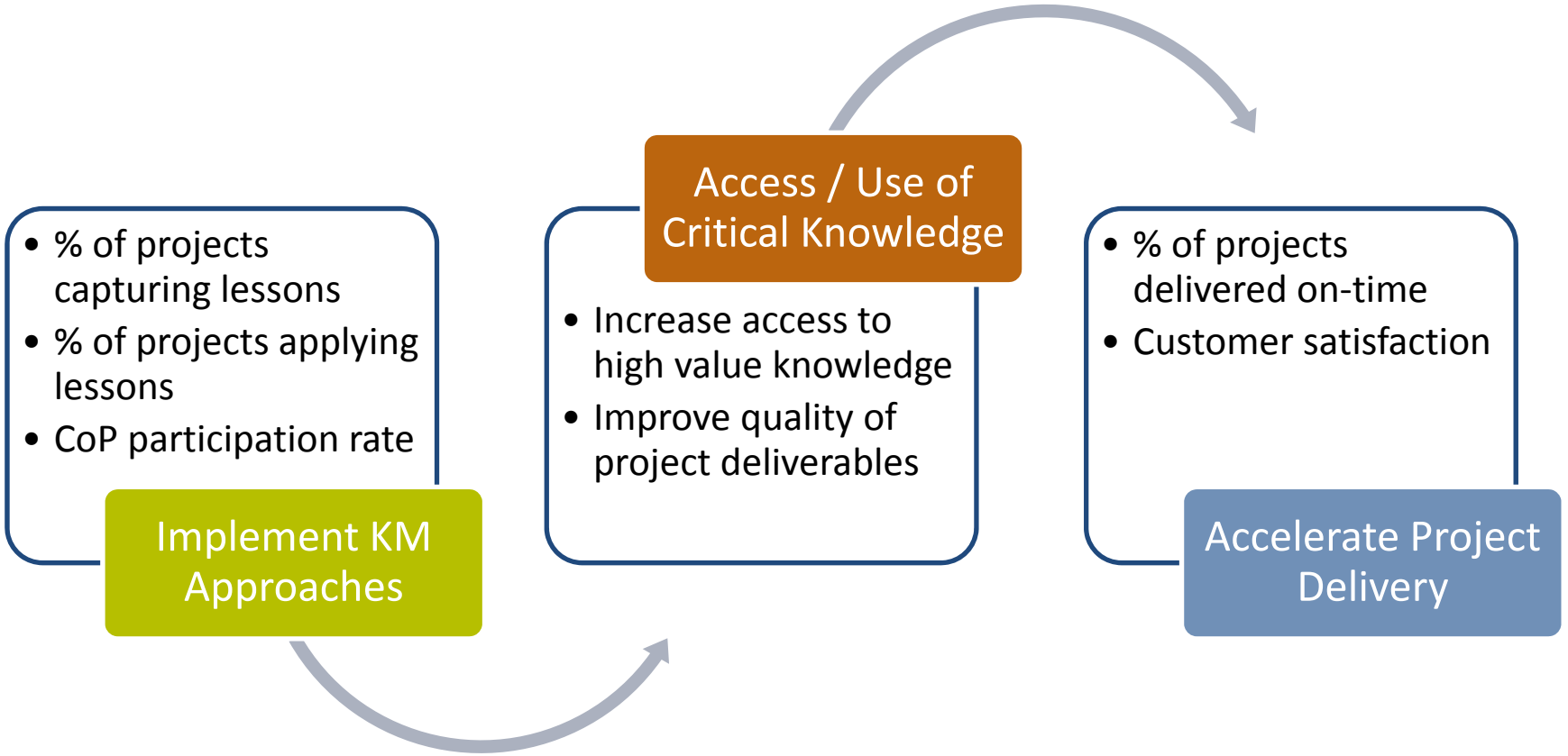
ALIGN MEASURES TO DEMONSTRATE IMPACT



- Define measures and expectations

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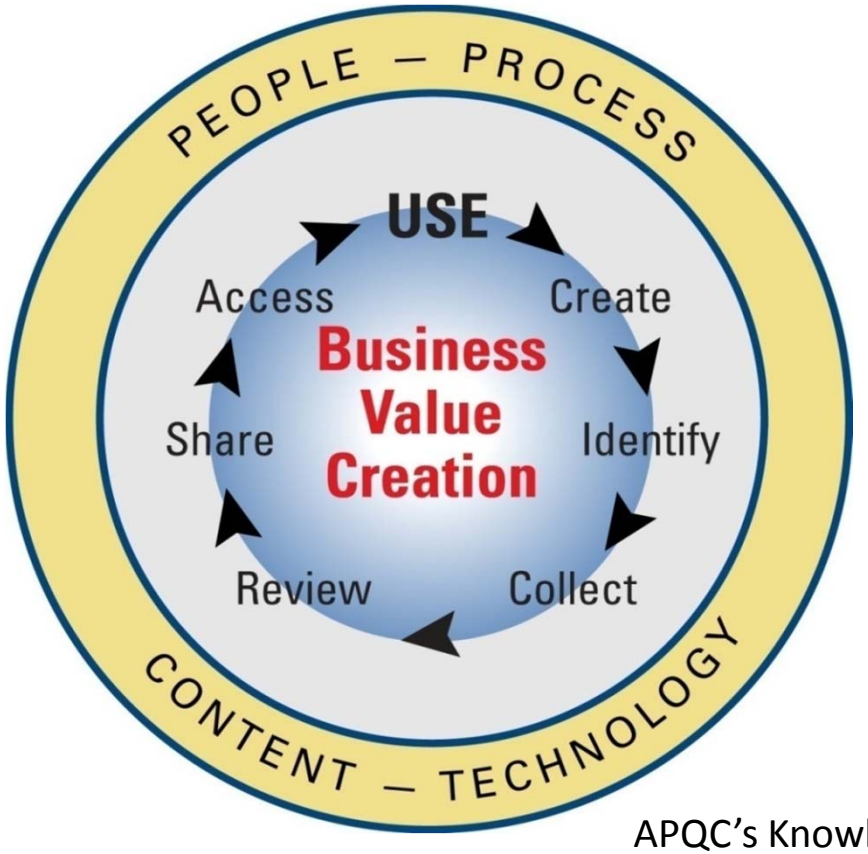
KNOWLEDGE MANAGEMENT ENABLERS

Without enablers in place, knowledge will not flow



APQC's Knowledge Flow Process℠

- Assess critical success factors, gaps, and potential risks

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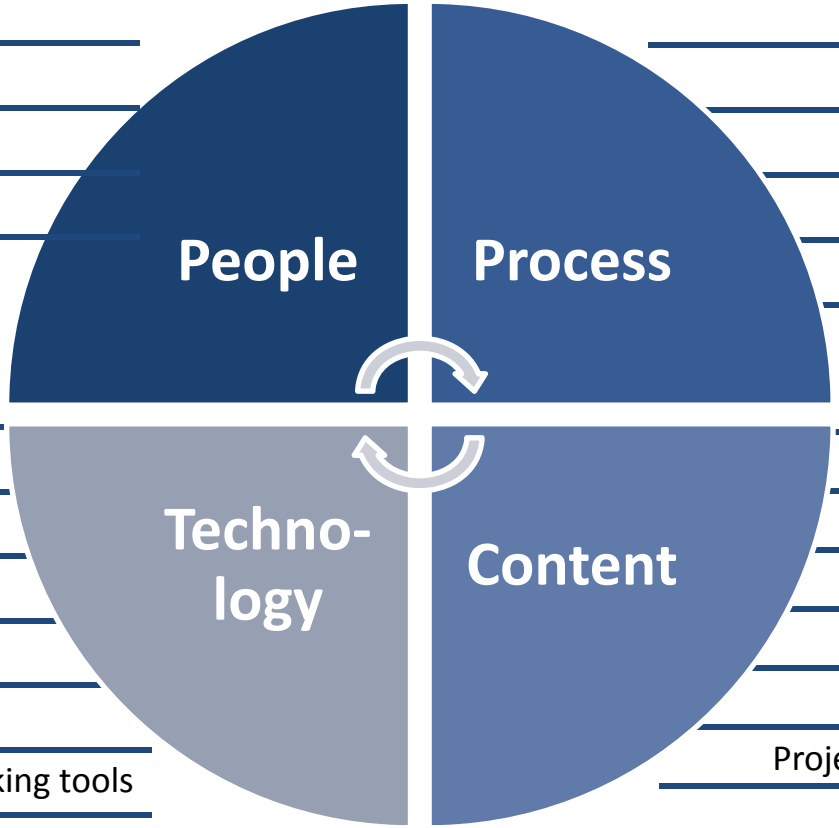
ASSESS CRITICAL SUCCESS FACTORS, GAPS, AND POTENTIAL RISKS



- KM Advisory group
- KM core group
- Knowledge champions
- Community leaders & members
- Training & communications
- Measurement & recognition
- Learning organization

- Knowledge flow process
- Forming communities of practice
- Collaboration process
- Transfer of best practices
- Shared standards
- Common taxonomy
- Metrics and reporting
- Feedback loop

- Document management
- Content management
- Expertise locator database
- Portals and repositories
- Mobile apps
- Collaboration and social networking tools
- Workflow and project management

- Standard project procedures
- Specifications
- Proposals
- Lessons learned
- Risk assessments
- Project activity models and profiles
- Career path guidance
- Software help
- Workflow and project management

Source: KM Program Benchmarks and Metrics: Survey Summary, 2018.

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BRINGING IT ALL TOGETHER

KM STRATEGIC FRAMEWORK

Objectives/Goals	Strategies and Actions
Awareness *Take KM Enterprise-wide*	• **Build and brand** an inclusive and accessible knowledge sharing environment • Increase awareness, utilization and **participation** – connect people to people and people to content • Execute **communication** plan * • Scale current KM practices to **all** locations
Easy to Use *Create , capture, use and reuse knowledge in the flow of work*	• **Align and provide on-going support for Knowledge Managers** • **Formalize and expand KM approaches** (CoPs, capture and reuse lessons learned, embed After Action Reviews into work flows) • **Partner with IT**– Discuss opportunities for use of technologies to enhance user experiences for sharing knowledge
Easy to Discover *Improve "one-stop shop" experience*	• Define how social medial tools compliment and work together. • Execute an **enterprise search roadmap** - Build and pilot metadata process, build taxonomies and increase coverage and utilization
Track Success *Achieve Level 3 Knowledge Management Maturity*	• Align and implement **KM Measures** • Solicit feedback, collect, document and communicate **success stories**. • **Reward and Recognize** knowledge sharing behavior • **Assess** annually – Create actions. Improve KM capabilities to improve knowledge flow

**** Applicable to all objectives***

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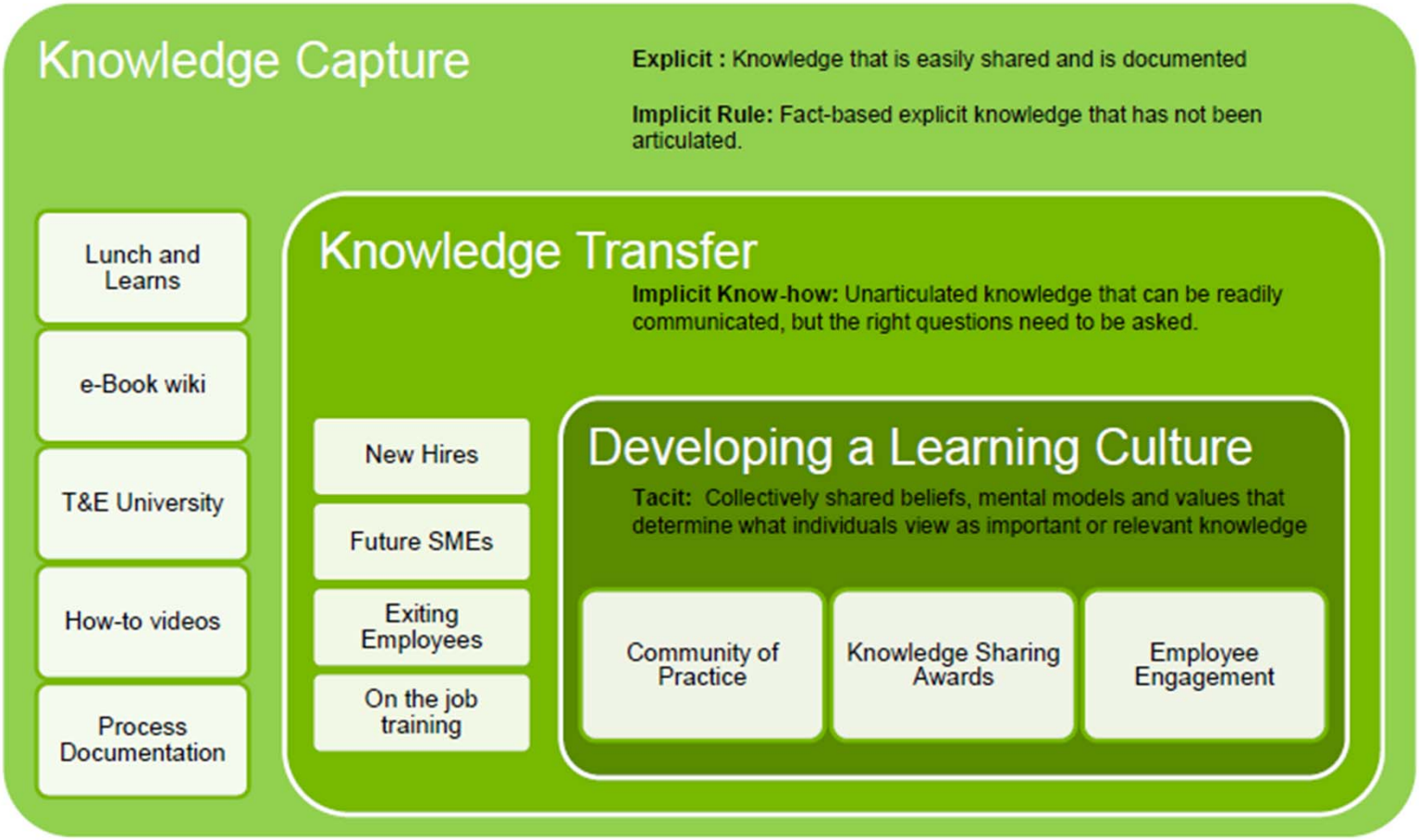
EXAMPLE: KM STRATEGY AT BOEING



Source: [Designing and Implementing Knowledge Management at Boeing Flight Test]

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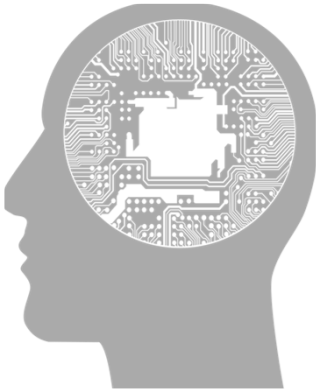
WHERE DO KM'S STRATEGIES CONVERGE?



Automation

Integration

User Experience

Personalization

Simplicity

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Automation

KM NEEDS TO PREPARE FOR NEW TECHNOLOGY AND THE OPPORTUNITIES IT REPRESENTS

Machine Learning

Artificial Intelligence (AI)

Predictive Analytics

Chatbots

Recommendation Systems

Digital Assistant (aka Digital Sidekick)

For more on this, check out breakouts on new technology or APQC's research on cognitive computing in KM.

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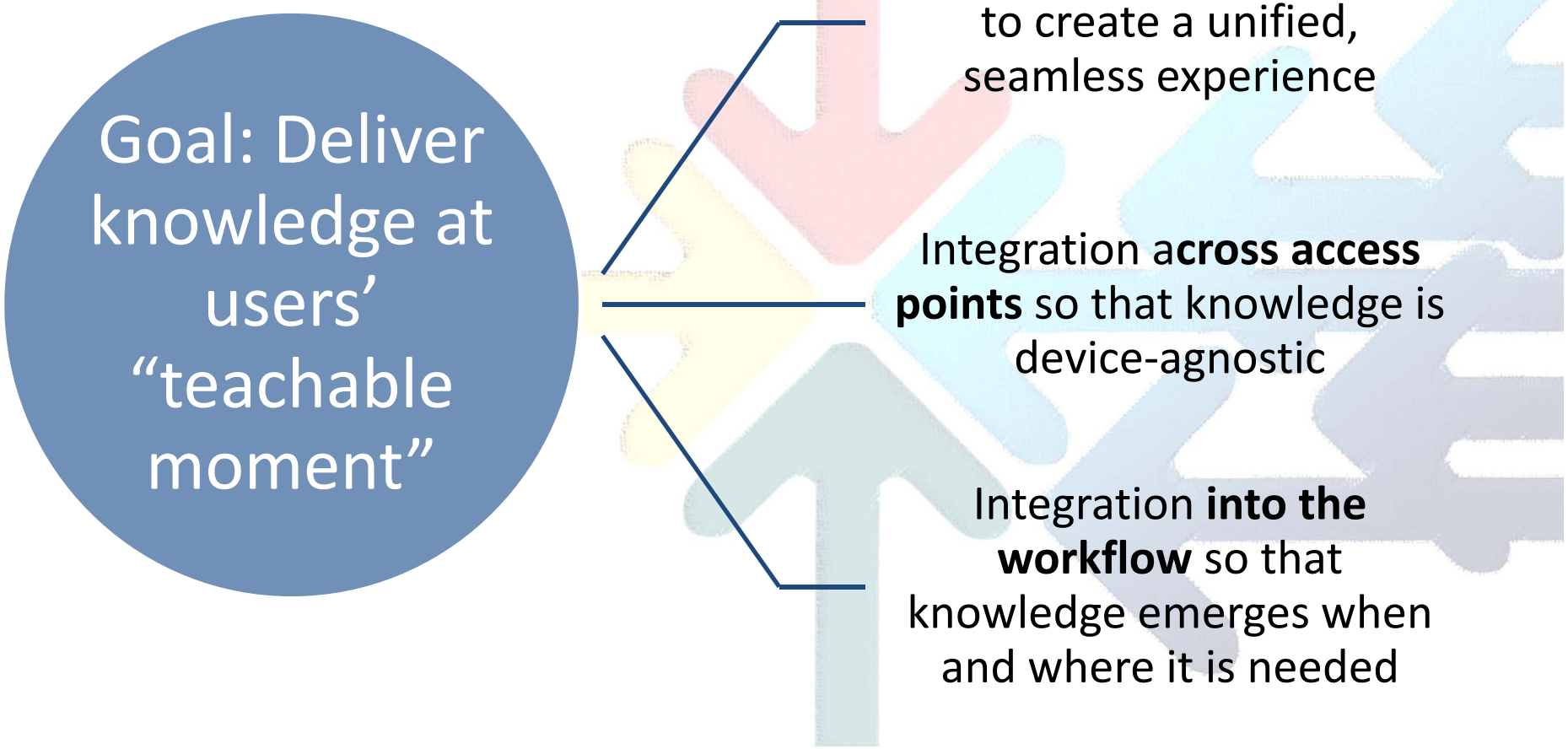
Integration

INTEGRATION TAKES MANY FORMS



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Automation + Integration

FOR SOME, THE FUTURE IS ALREADY HERE

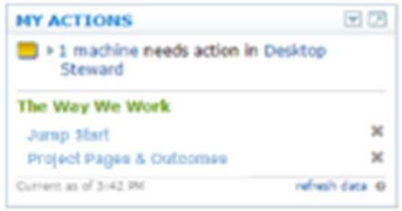
Anticipatory Knowledge Delivery at MITRE: New Project Leaders Use Case

Detect New Project Leaders

- Initial assignment as PL in O*F
- *8 digit direct* projects only
- Not previously named as a PL in the past 3 years, AND/OR
- Is new to MITRE within the past two years

Deliver Notifications over a period of time

Provide actionable & referential resources



- Understand MITRE's FFRDCs and the MITRE Way — Week One, Day 2
- Project Pages and Quality Outcomes — Week One, Day 4
- Staff Your Project — Week Two, Day 8
- Connect and Stay Informed — Week Two, Day 10
- Highlights of the MITRE Way for Project Leaders — Week Three, Day 15
- Stengthening the Core (STC) — Week Three, Day 17
- Leadership Resources — Week Four, Day 22
- Next Steps — Week Four, Day 24

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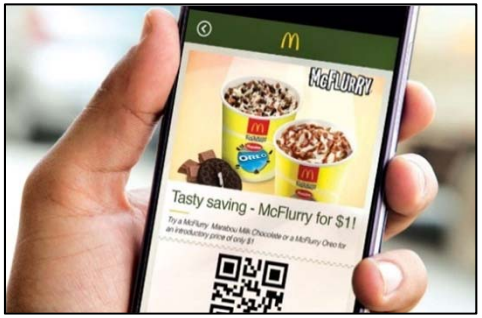
Personalization

PEOPLE EXPECT PERSONALIZED EXPERIENCES



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Strategy
Execution
Success

ADDITIONAL RESOURCES IN APQC'S KNOWLEDGE BASE

- Strategic Planning for Knowledge Management
- Infographic: What Goes Into Strategic Planning
- APQC Process Classification Framework
- Document Your KM Strategy and Roadmap

**Accessible with APQC Membership*

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