

# Where Does the Knowledge and Information Enterprise Go From Here?

**DOD AND FEDERAL KM SYMPOSIUM**

**MAY 15-17 2018**

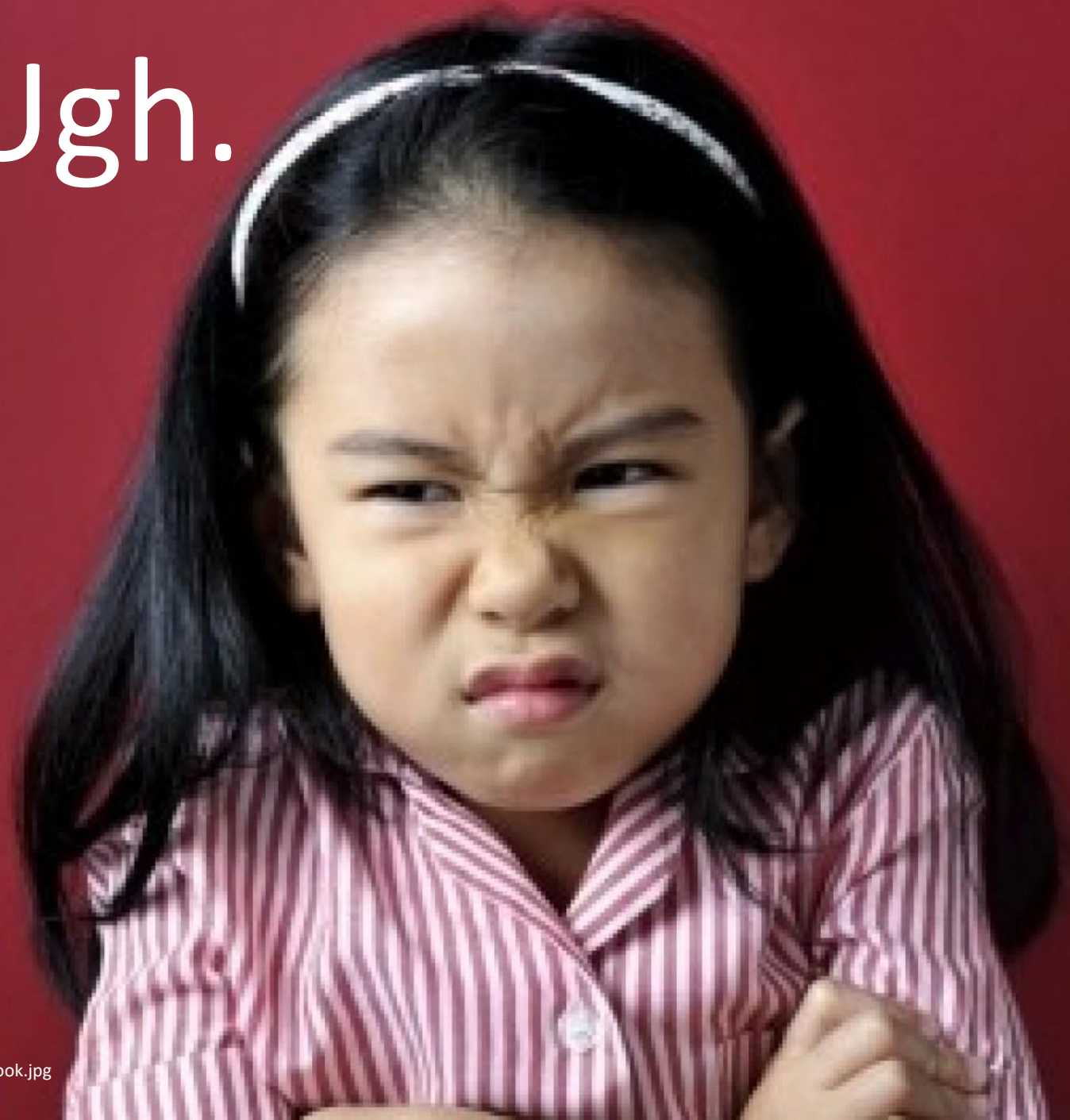
**GLOBAL KNOWLEDGE INTEGRATION ▶ EMPOWERING DECISIONS**



# Holistic KRIDM Management?



KRIDM? Ugh.



# What about...

What about you?

- Business Process Management?
- Data Analytics?
- Security?
- Robotic Process Automation?
- Artificial Intelligence?



What about us






# Your Digital Transformation begins with **Intelligent Information Management**

As the currency that fuels and funds Digital Transformation, information is your most important asset. At AIIM, we believe that there is a core set of capabilities that are necessary for organizations to digitally transform. We call it **Intelligent Information Management (IIM)** and we wrote the book.

[Get the IIM eBook](#)



Think different.

A red Tesla Roadster is shown in space, attached to a rocket. The car is positioned diagonally across the frame, with its front end pointing towards the top left. The Earth is visible in the background, showing blue oceans and white clouds. The car's wheels and body are clearly visible, and it appears to be in a stable orbit.

It's called  
*innovation.*  
I am trying to  
provoke you.

# Where to from here?

- See your role in the big picture more clearly
- Help you with internal marketing when you need it...and you're going to need it to make strategic change







## Holistic KRIDM management (or whatever) should enable:

- Senior leader **decision making** – fastest possible, “data-driven” decisions
- Senior leader **situational awareness** – so they’ll be ready for quick decisions when there is no time to “do more homework.”



BTW: Records management compliance will come along for the ride.

Photo source - [https://thenypost.files.wordpress.com/2015/08/surfing\\_dog\\_in\\_australia-31.jpg?quality=90&strip=all&w=638](https://thenypost.files.wordpress.com/2015/08/surfing_dog_in_australia-31.jpg?quality=90&strip=all&w=638)

# What is The Joint Staff?

- Assists the Chairman, Joint Chiefs of Staff
- The Chairman is principal military advisor to:
  - The President
  - The Secretary of Defense
  - The National Security Council
  - The Homeland Security Council
- Provides for the ***unified strategic direction*** of the combatant forces; for their operation under unified command; and for their integration as an efficient team of land, naval and air forces.
- More here: <http://www.jcs.mil>



Chairman is most senior US military officer by law... **Joint Staff supports the Chairman**

How big is it?

- ~4,159 (2015)
  - 40.5% military (all Services)
  - 24% civil servants
  - 35.5% contractors
- 261 detailees from other organizations & 42 int'l detailees (2013)

# Who is The Joint Staff?



(Lemnitzer, Burke, Twining, White, Shoup)

# Where is The Joint Staff?

- Pentagon, and
- Hampton Roads/Norfolk
- Other locations
  - “Chairman’s Controlled Activities” (6)
  - Elements of former Joint Forces Command
- The nine combatant commands –  
“administrative oversight”



# Our “CEOs”

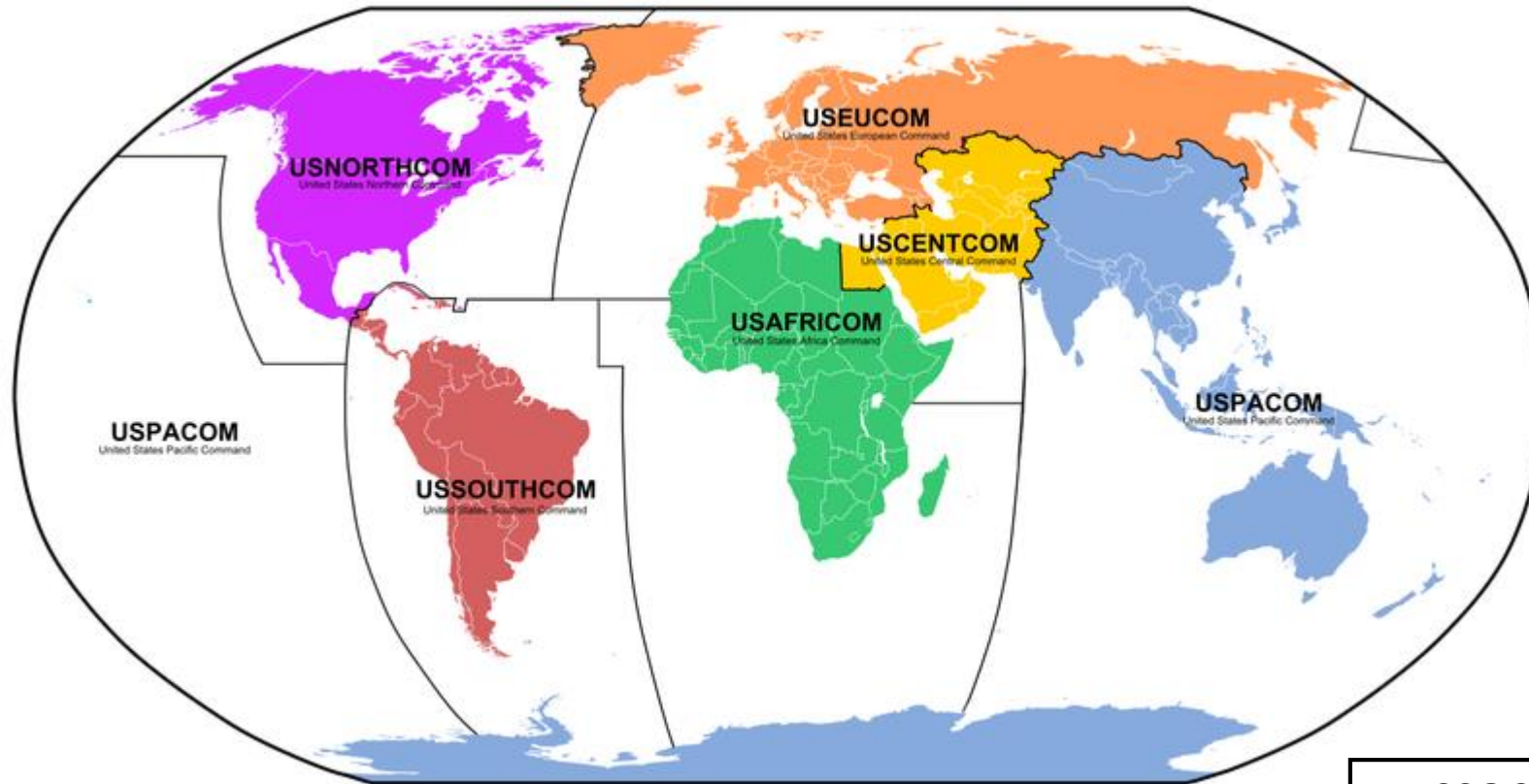


The 1<sup>st</sup> – GEN Omar Bradley



The 19<sup>th</sup> – GEN Joseph Dunford

# How we divide it



Headquarters elements > 30,000 people

- + USSOCOM
- + USSTRATCOM
- + USTRANSCOM
- + USCYBERCOM (soon!)

# Our “Theater of Operations”



- Includes all the water (on top of and under it)
- Sky above it
- Space
- Cyberspace





Our Customers?

Everyone.

...which brings me to my next point





**It's not  
rocket  
science**



Up.

Data.  
More than one  
definition?  
Here's mine:

- Paper
- Electrons  
(structured/unstructured)
- Knowledge of business  
value in our members'  
brains!

Have to deal with it “cross functionally”





But this is confusing because a lot of “regular” people (not nerds like me) think:

Data = 1s and 0s... bits and bytes.

OK, then how about this:

Data  
+ Information  
+ Expertise  
= What your organization’s leadership needs optimized...so they can make ***the best business decisions as quickly as possible.***

...It’s way bigger than simply “records.”

Let go and  
consider a  
different  
perspective.



Data > information > knowledge > wisdom?

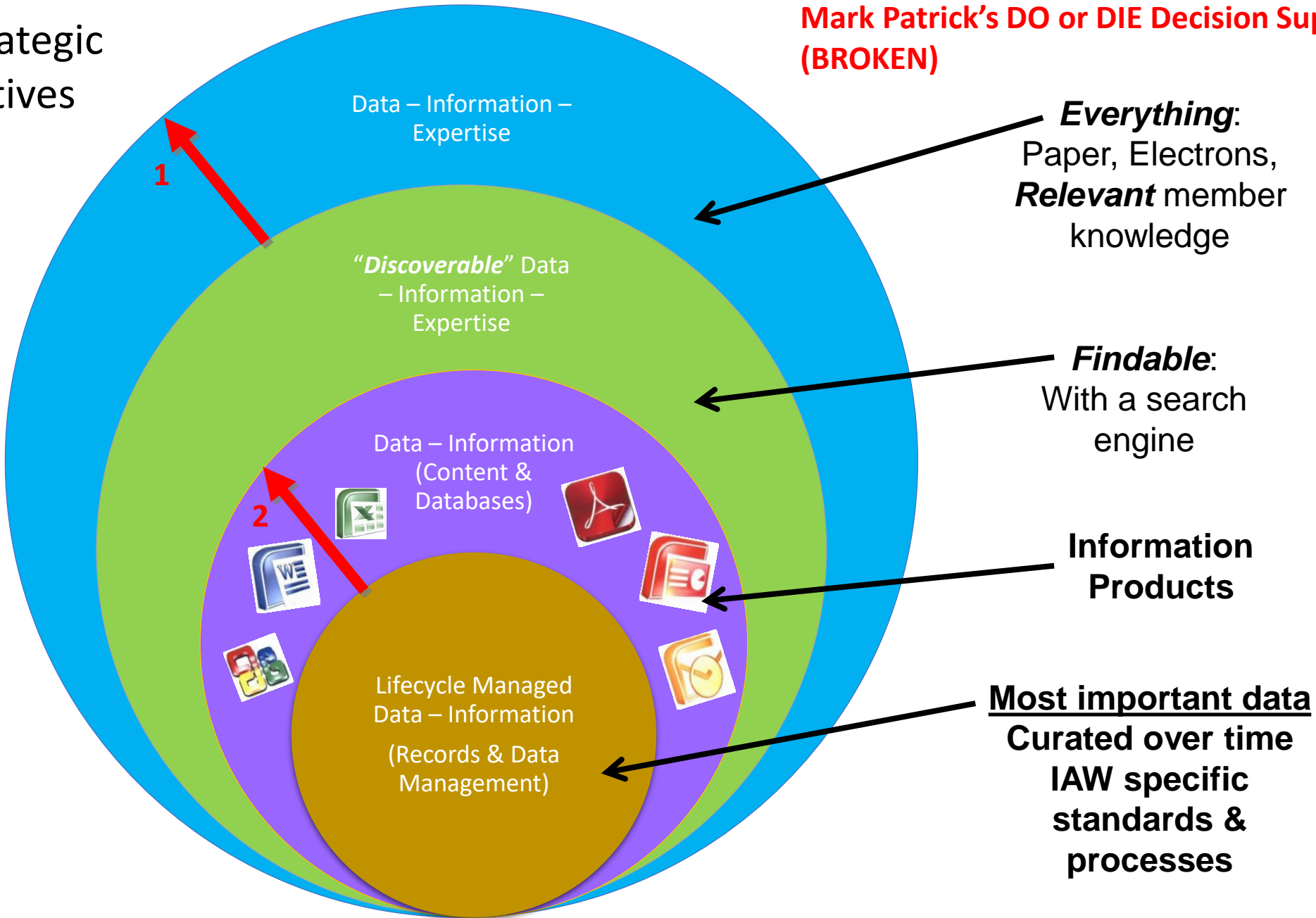
How about “expertise”?



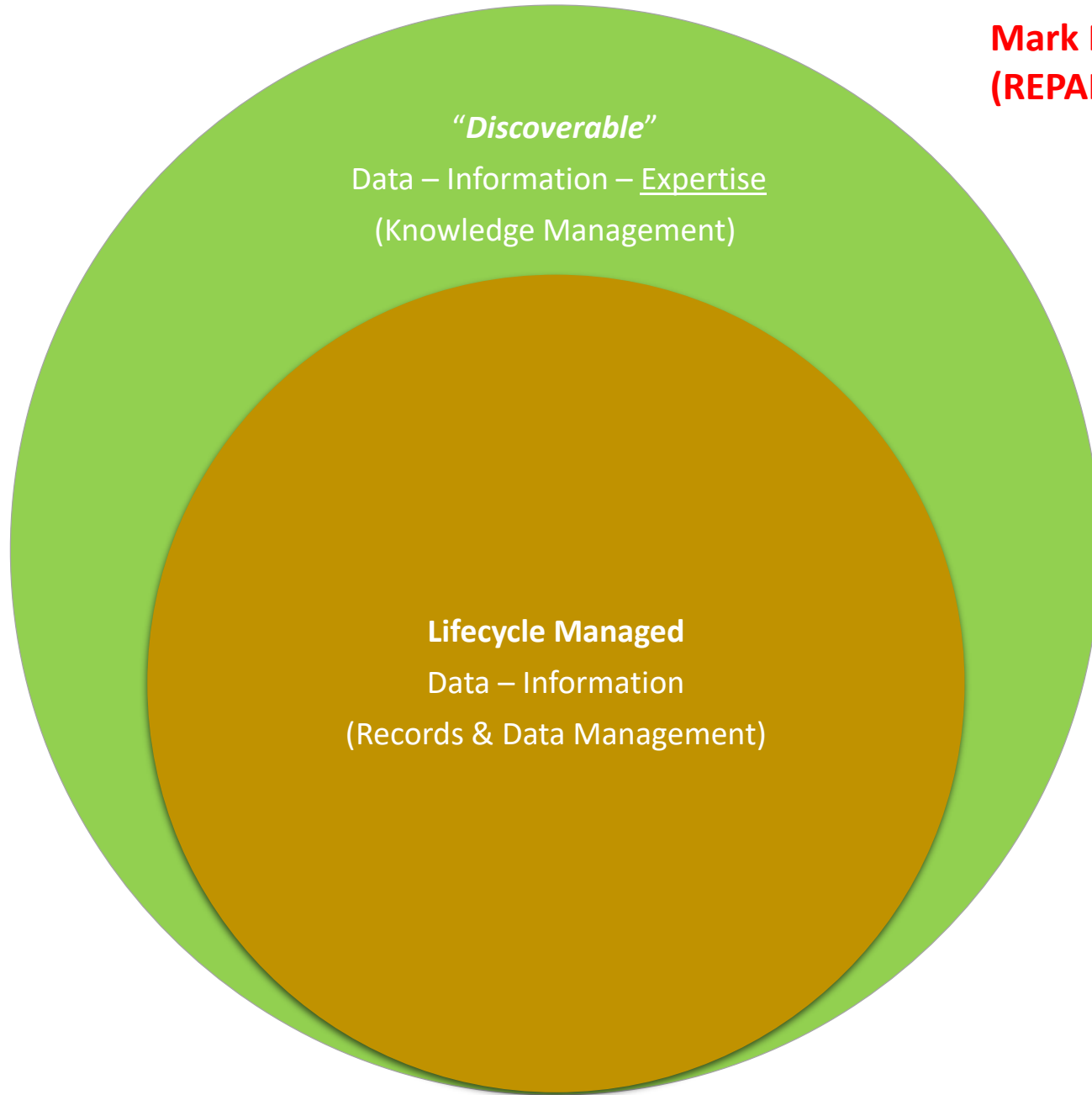


Two strategic imperatives

**Mark Patrick's DO or DIE Decision Support Model®  
(BROKEN)**



**Mark Patrick's DO or DIE Decision Support Model®  
(REPAIRED)**



**Decision Support  
Ideal Strategic End State**

**A well planned, integrated, sustainable solution involving people, process and technology will allow organizations to perform five fundamental functions:**

- 1. Task Management (BPM, workflow, etc.)**
- 2. Collaboration**
- 3. Search**
- 4. Records Management (ECM, Data Mgmt, IM, etc.)**
- 5. Business Intelligence & Data Analytics**





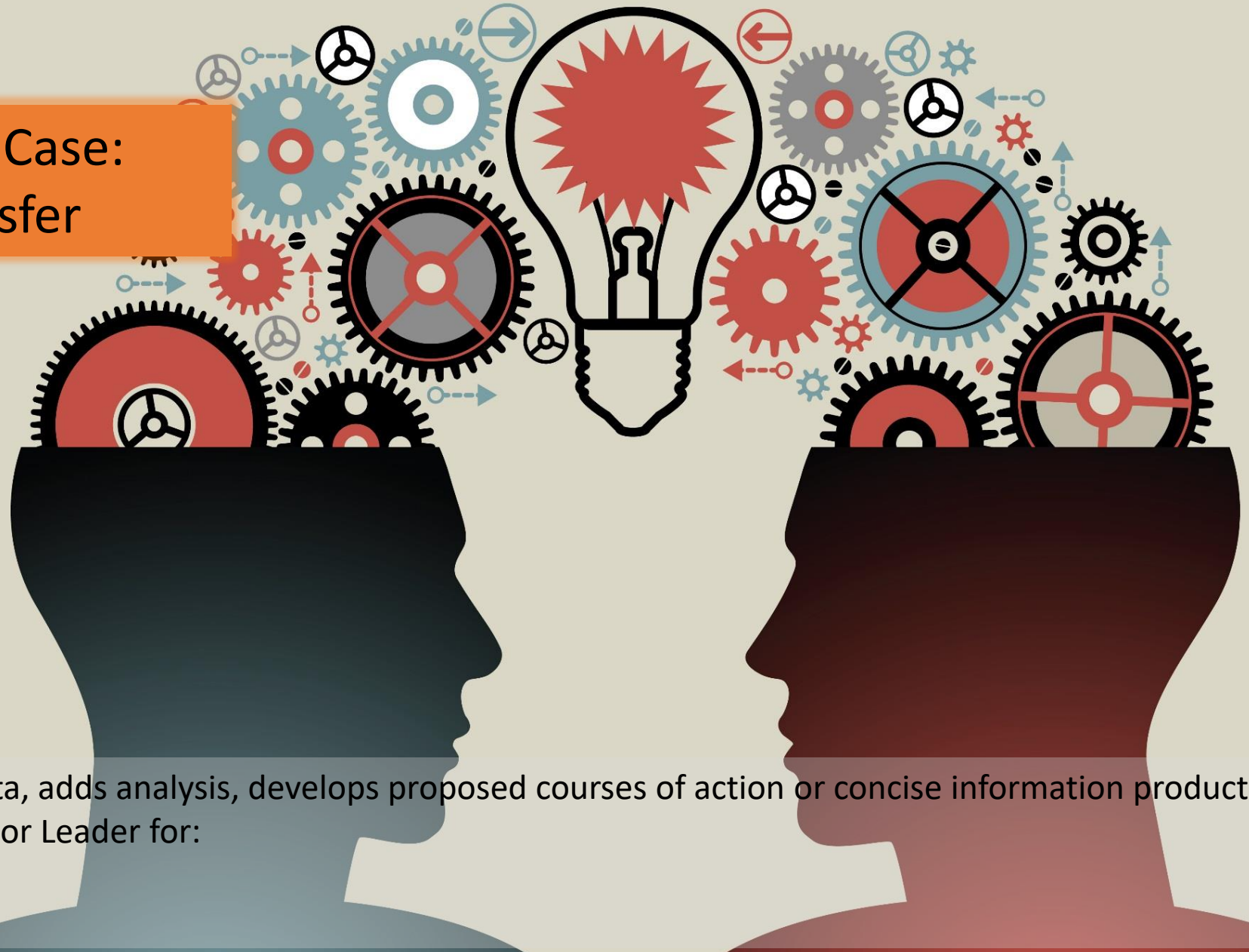
"I'm here about the details."

More than one way to skin a cat



...so what are we trying to enable *along with our colleagues?*

## Fundamental Use Case: Knowledge Transfer



1. Knowledge worker assimilates data, adds analysis, develops proposed courses of action or concise information products.
2. Transfers this homework to a Senior Leader for:
  - A Decision
  - Situational Awareness

# Optimize data environment > exploit it!

1. **Data map** > federated search indexed to all repositories (make it *all* discoverable *and* secure)
2. **Clean up** the data (analytics, taxonomy, organization, etc.) and get it life-cycle managed... THIS IS RECORDS MANAGEMENT WITH A SUBTLE SHIFT IN FOCUS
3. Facilitate **collaboration** and capture of data in context
4. Facilitate **knowledge transfer**
5. **Capture** of human knowledge of value and **convert** it to information products prior to departure of personnel

People, process, and technology

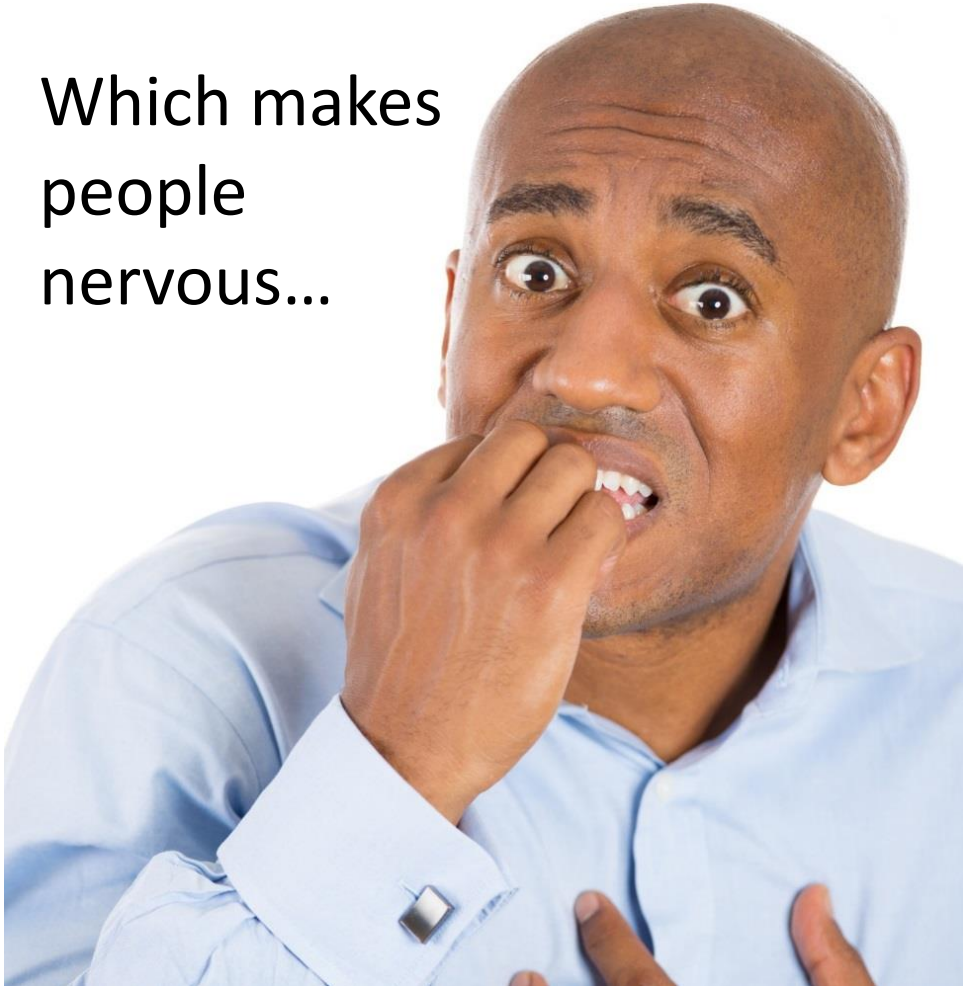
You can't  
manage  
anything until  
you know what  
you have – you  
need **a map**





You'll find you need to get rid of a lot of stuff!

Which makes  
people  
nervous...



**KEEP  
CALM  
AND  
THROW AWAY  
YOUR TRASH**

# The Dangers of Prolonged Record Retention

The Dangers of prolonged *DATA RETENTION*:

- Costs of Record Retention
- Costs of Discovery
- Potential Liability in Litigation

**Yes, but even more importantly for senior leaders:**

- Poor decisions
- Low situational awareness



More like  
**HUGE**  
Data



You must  
*automate*  
as much as  
possible!



You need to understand your main **business processes** and where you are creating new data (records—whatever) so you can insure it is managed




But remember that people have to be able to work... you can't give them a miserable **user experience** in the name of compliance.

**Sad User Experience  
= SUX**

**(you can sub other  
words for "sad")**




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 Patrick, Mark S CIV JS DOM (US) ▾

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5:37 PM



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**Ask Me About**

Here are some topics Patrick, Mark S CIV JS DOM (US) can help you with. To ask a question, click on the relevant topic below.

- Directives
- Records Management
- knowledge management
- Information Manag...
- Automatic Declass...
- Security Review (SR)
- KM CFT
- FOIA
- NATO Policy
- Enterprise Conten...
- KMB
- Searching on Know...
- SharePoint Govern...
- Civil Air Patrol
- Declassification
- Search
- SharePoint
- eDiscovery
- Forms
- AIIM
- Mandatory Declass...
- Collaboration

[Hide Additional Keywords](#)

Many times the **people-to-people interaction** is better for business than finding data anyway, so **work with the knowledge management team** on that

# You have to ask yourself

## What are the implications of this holistic approach?

- People?
- Process?
- Technology?
- Data/info?





# KRIDM? – Core competencies should be properly aligned under an overall Decision Support Strategy



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