



It's About Time!
Finally, a robust KM Methodology
that informs
KM Roles, Responsibilities and Learning

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It's About Time!

- This talk will trace the history and emergence of the original DoD KM Methodology into the robust **KM Methodology** it is today.
- It now serves as a core element of the **KM Institute's KM Body of Knowledge (KMBOK)**[™]. The associated **Knowledge Maturity Model (KMM)**[™] will be introduced as well.
- Then, the implications for **KM roles, responsibilities, skills and competencies** and **requisite education, training and certifications** will be detailed.
- This will be done with a view to the way forward, including an integration of university and KM Institute efforts, **dual awards** (degree and certification) and an innovative CEU Program.
- This presentation could be a milestone toward a renewal and enrichment of the original US Gov "**CKO Roles**" and "**CKO Skills and Competencies**", including expansion to all the KM roles that have emerged over the last decade, or so.
- The **KMEF** may be the requisite implement of change.



Knowledge

Are you prepared for the Knowledge Age?

Information Age



Knowledge Intensive Activities (Meetings, Projects, Processes, AARs, ...)



50%

Skills & Competencies

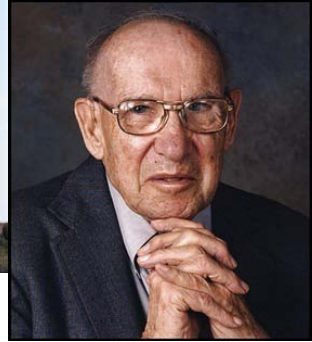


“Knowledge Age”




Innovation






Peter
Drucker

“Power (Knowledge) Worker” Productivity



20th Century - "The most important, and indeed the truly unique, contribution of management in the 20th century was the fifty-fold increase in the **productivity of the manual worker in manufacturing.**"



21st century – “The most important contribution management needs to make in the 21st century is similarly to increase the **productivity of knowledge work and the knowledge worker.**”



Some Knowledge Intensive Activities:



1. **After-Action Reviews (AAR)** – “What would you do differently next time?”
2. **Project Mgmt (PM)** – not just “PM” but “PM in the Knowledge Age” LLMP
3. **Processes** – Substantially improve processes, ‘Checklists’, Keys, etc. BPMP
4. **Meetings** – Achieve purpose efficiently
5. **New Knowledge Creation** – Brainstorming, Café Techniques
6. **Rethink Learning** – Perform Support, Rapid Development Techniques, E-Learning
7. **Many Others** – CoPs, Expert Locators, Knowledge Flight, Personal KM, etc.

KM Methodology (funded by US DoD)

“Create a Learning Organization”

- A0 Create a Learning Organization
 - A1 Create the Knowledge Imperative
 - A11 Understand KM
 - A111 Understand KM Sciences
 - A112 Understand KM Processes
 - A113 Understand KM Techniques
 - A114 Understand KM Technology
 - A115 Benchmark Proposed KM Solutions
 - A116 Catalog Applicable KM Principles
 - A12 Perform Knowledge Audit
 - A121 Convene Kickoff Meeting
 - A122 Form Advisory Group & Audit Team
 - A123 Initiate Communications Plan
 - A124 Collect Enterprise Info
 - A125 Analyze/Map Results
 - A126 Deliver KM Audit Report
 - A13 Develop Vision & Performance Targets
 - A131 Evaluate Audit Report
 - A132 Create KM Strategic Vision
 - A133 Start Change Management
 - A134 Determine KM Goals/Perform. Measures
 - A135 Publish Strategic Vision/Perform Targets
 - A14 Develop KM Strategy
 - A141 Integrate Strategic Goals
 - A142 Align KM Mission/Objectives
 - A143 Formulate KM Strategies
 - A144 Justify KM Strategies
 - A145 Review/Approve Strategies
 - A146 Publish Strategies
 - A15 Link Plans
 - A16 Get Buy-In
 - A2 Design/Justify KM Initiative
 - A3 Implement/Manage Organizational Change
 - A4 Continuously Improve Operations

A1 Create the Knowledge Imperative

Information about Activity A1

Label: Create the Knowledge Imperative

Title: Perform Strategic Planning - Develop the vision, goals, performance targets, and strategies for the organization based on its mission, with an emphasis on the KM strategy implications.

☒ Description ☐ Metrics

Set the Course

“If you don't know where you're going, you'll probably end up somewhere else.”

(Often attributed to Yogi Berra)

“If we don't change our direction, we might end up where we're headed.” Old Chinese

the organization exists, and what it must do for whom to justify its existence. Everyone must understand the mission because it is the basis for decision making within the organization and for its vision of the future. Every organization should have a vision statement. Vision is the framework that guides those choices that determine the nature and direction of an organization. It is what an organization wants to be. Every decision and every action taken in the organization must align with and support either the mission or the vision, or they are irrelevant.

Senior managers develop the vision, goals, performance targets, and strategies for the organization. In large organizations, the vision, goals, etc., may be based on an assigned or derived mission rather than one created within the organization itself. In such large organizations, senior managers take action to compare and contrast their strategic plan with other strategic plans, and solicit the commitment and support of the individuals and organizations that are essential to its successful implementation.

The conventional output of a planning activity (A1) is the Strategic Plan (strategic

Save

Cancel

0 References



There should be no mistaking a Bull



There should be no mistaking a Squirrel 🐿

Youtube: “Running with the Squirrels” (EDS 2000)



Wrong Track!



**Ad Hoc
No Formal KM
Methodology**

Track One



KM BULLS

**Formal
KM
Method-
ology**



Track Two



KM Squirrels™

**Change
Mgmt
("No-
Budget
KM")**

KM Success



Principles

Two Essential KM Tracks
"Integrated" Tracks 1 and 2



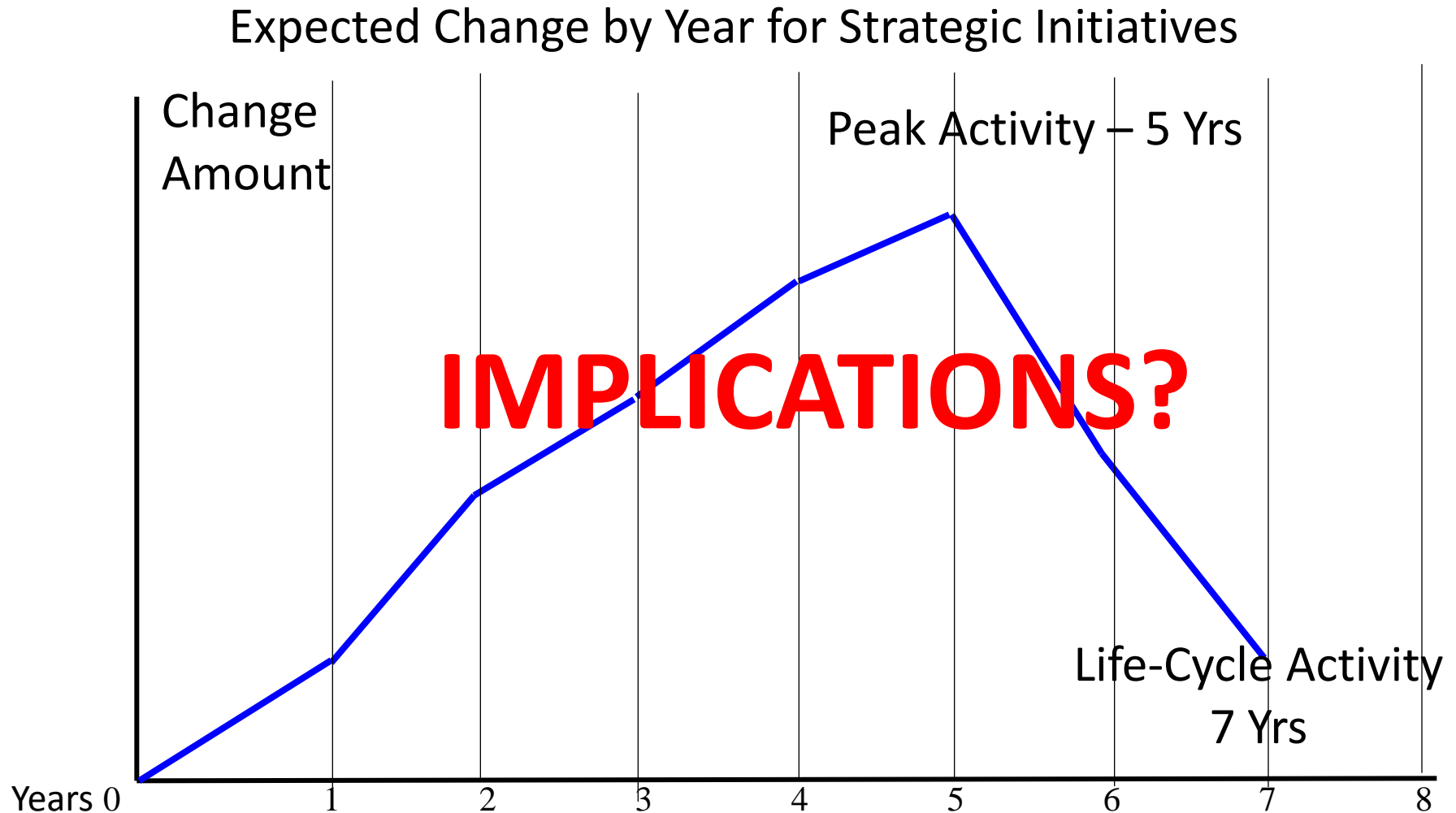
Introduction to Change Management in the Knowledge Age



Be Prepared for the Long Haul

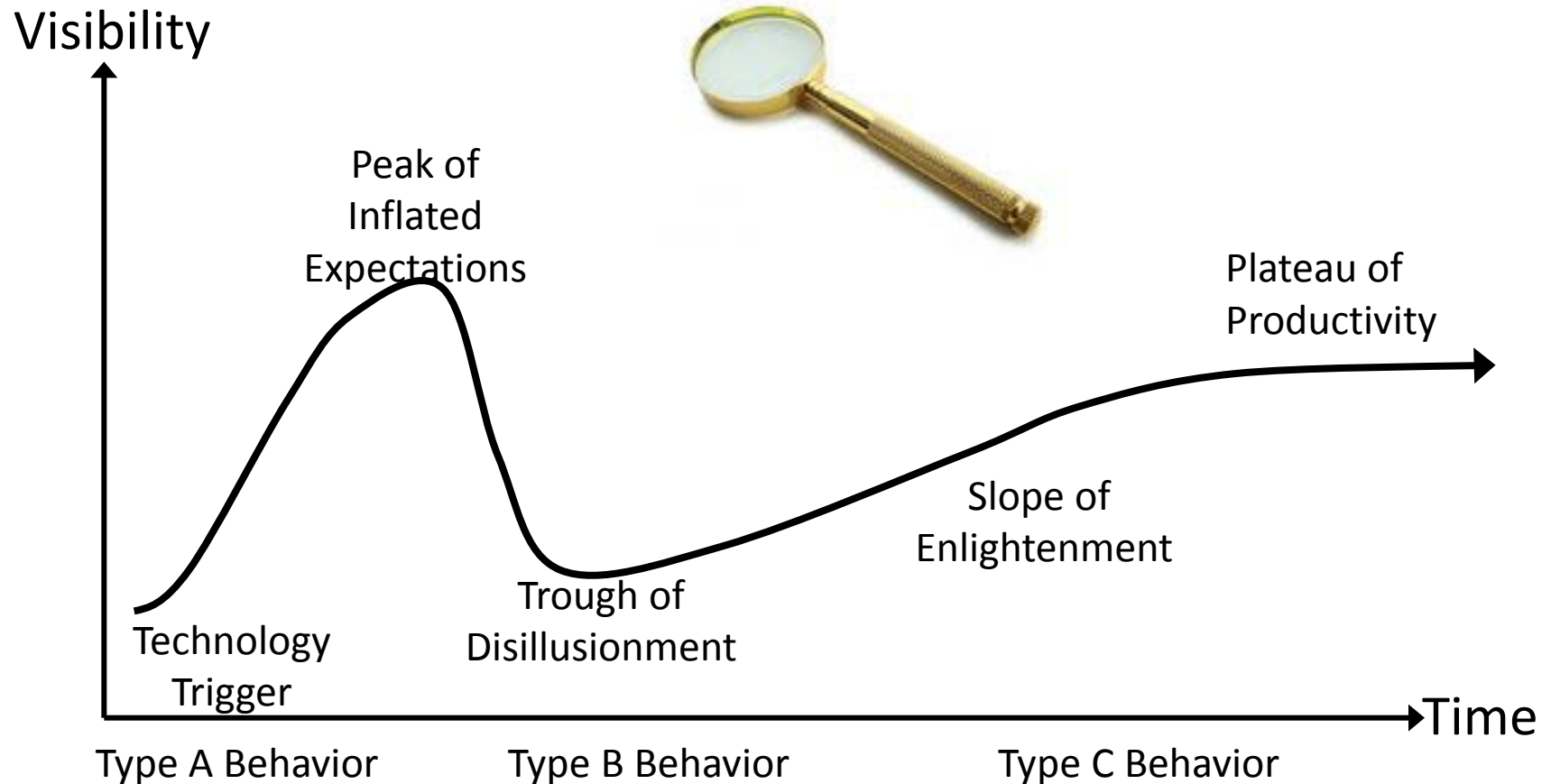
Source: Kotter, HBR, 1995

In what year do you think change management activity **peaks**?



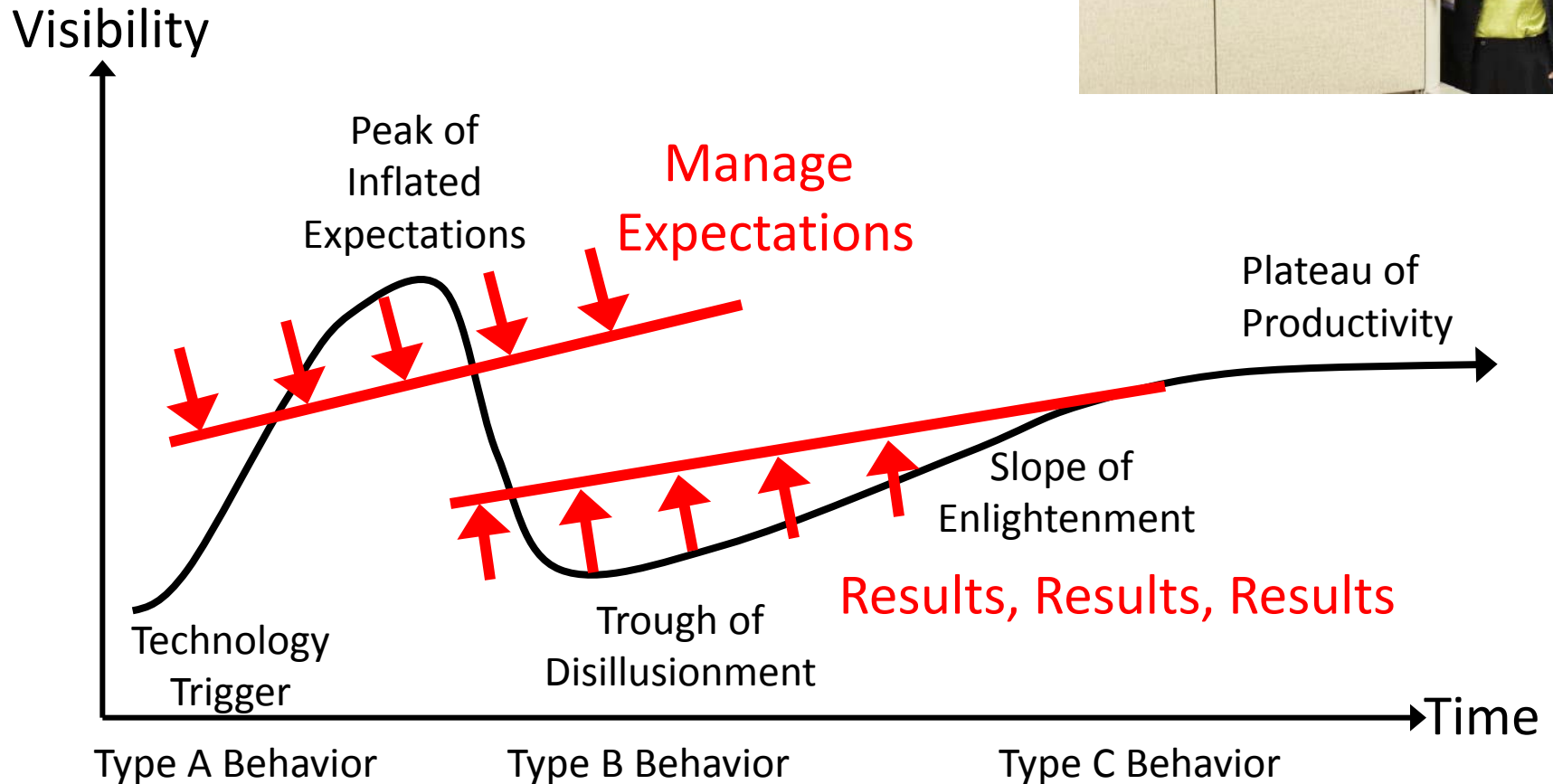
The Hype Cycle (Cycle)

What are the implications for the CKO?



The Hype Cycle (Cycle)

What are the implications for the CKO?



What are some early CMgmt initiatives – training, stories, hiring?





Strategic Change Mgmt - 8 Key Transformation Steps

Skip one, risk all!

1. **Establish Sense of Urgency** – 50% fail this phase, too many managers, not enough leaders, when is urgency rate enough?
Answer: **when 75% think business as usual is unacceptable.**
2. **Form Guiding Coalition** – Early on, large numbers of leaders must create shared commitment to excellence. Keys to Success: powerful – titles, info, expertise, reputations, relationships.
3. **Create a Vision** – Clear, compelling (easily communicated in less than 5 min, appealing, positive reactions, clarifies direction). Up to three months to yr to create, yields alignment, not energy consuming diversions.
4. **Communicate the Vision** – Often under communicated by factor of ten!
Turn every comm. to re-enforcing, invigorating broadcast.
Change training focus from generic to business problems/new vision.
5. **Empower others to Act** – Eliminate real/perceived obstacles, bosses who don't align, align performance appraisal system.
6. **Create Short-term Wins** – Celebrate accomplishments: results/results/results. Short-term goals keeps urgency high. Lessons learned clarify vision.
7. **Consolidate Improvements** – Don't declare victory too soon before ideology takes hold. Leverage short-term wins to attack even bigger initiatives.
8. **Ingrain New Approaches** – Stickiness. Sticks when engrained.
Connect new behaviors & success. Ensure leadership development/succession personify new K Age approaches.



Phase I – Create the Knowledge Imperative: Plan/Start Change

How do you 'read' this visual?



Phase II – Create the Knowledge Imperative: Plan Strategy



Phase III – Design and Justify



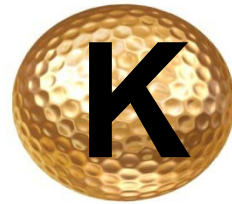
Phase IV – Implement/Manage Organizational Change



Phase V – Operate and Maintain (Continuously Improve)



Knowledge Management Methodology



Create a Learning Organization

The KM Institute's KM Body of Knowledge (KMBOK)™ includes a:

- *KM curriculum from KM Awareness to full KM Certification*
- *KM references library*
- *KM Technology Solutions Map, and*
- *KM Methodology to "Create a Learning Organization"*

The KM Methodology is taught in the KM Institute's KM Certification Programs. It is provided in a Knowledge Base (KBase) Tool by ProCarta.

Please peruse the high level content by phase; track activity A1234, under Plan Change, to see an actual content slice.

To learn about our icon-based "KM Books of Knowledge™" metaphor, click the "Books" icon or the "Learn" icon to take a brief interactive video lesson. The methodology's "Keys to Success" and "Guiding Principles" are provided here, plus a few key KM reference documents as well.

Create the Knowledge Imperative by Phase

Implement Major KM Initiatives by Phase

Continuously Improve

1 Plan Change

2 Plan Strategy

Take this LESSON.
Learn how to use new, KBase Tools in the Knowledge Age.

3 Design / Justify KM Initiative

4 Manage Organizational Change

5 Continuously Improve all KM Initiatives



KM Books of Knowledge™



Use of KBase Tools



Keys to Success



Guiding Principles



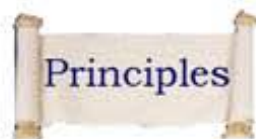
Key Reference Documents

Team Learning Plan
A1232 Design Key Stakeholder Learning Plan
A1233 Design Knowledge Coordinator Learning Plan
A1234 Design Knowledge Worker Learning Plan
A1235 Design Learning Delivery Plan
A1236 Publish KM Awareness Learning Plan
A124 Document Implementation Requirements/Organizational Impact
A1235 Review/Approve Developmental Change Management Plan
A13 Deliver Developmental Change Management Learning Plan
A14 Prepare Initial Cadre of Knowledge Coordinators
A15 Launch KM Squirrels Program
A16 Consolidate Developmental Gains

A1234 Design Knowledge Worker Learning Plan

Guideline for

Performing Task:



Principles

Guiding Principles

Generally applicable truisms that transcend organizations and should be considered as fundamental guidance for KM initiatives “in the Knowledge Age™”.

Whatever training modality is selected and content taught, make sure to follow up training with facilitated **Café Sessions** to discuss topics studied with peers and facilitators.

See KM Institute KM Methodology, A1141 Understand K Cafés

Lesson Module



*A n existing **e-module** of a course relevant to this activity/task. Preferably, module available in the KBase. List of other relevant, remote courses might be advantageous, included here as well .*

Study KM Institute KM400, Module 1.14 K Café Techniques.

Guidelines



*A statement of policy/procedure which provides direction/ **guidance** ; helps determine a course of action for this activity/task. Guidelines could be formal policies, regulations, statutes that constrain or direct the approach used for this activity or task.*

There are basically four types of training that have emerged as essential ingredients in successful transformation efforts. Here they are listed plus some guidance or the basis for each type.



A16 Consolidate Developmental Gains

*Specific **colleagues** through whom you can gain access to needed information and knowledge to better perform this activity or task.*

Knowledge Maturity Model (KMM)[™]



Create a Learning Organization

Sophisticated, established and complex disciplines often develop maturity models as they mature, such as SEI's Capability Maturity Model (CMM)[™]. Some KM maturity models were developed prematurely in 1999–2003 era. But, little work has been done since. It's about time, KM as a discipline, and associated tools and methods mature.

We've surveyed the original models and new ones in the context of emerging 'Best Practices' in KM Methodology. We found, commensurate with a Knowledge Age focus, that a maturity model should be not only a diagnostic assessment tool, but **prescriptive** as well,

It should be continuous not staged, flexible enough to represent reality, and robust enough to be more than just a roadmap. The KM Institute's KMM[™] enables the user to not only determine their own KM maturity level, but how also to move up the maturity scale, to create the knowledge imperative, and to realize the full benefits of the emerging Knowledge Age through successful KM Initiatives.

Please peruse the **KMM[™] by maturity level**, or click the visual icons to learn more about associated material.

Create the Knowledge Imperative

1. Initial
Plan Change

2 Aware
Plan Strategy

3 Imperative
Design

Manage Organizational Change

4 Initiative
Implement

5 Expand
Initiatives

6 Enrich
Cont. Improve



KM Books of Knowledge[™]



Use of KBase Tools



Keys to Success



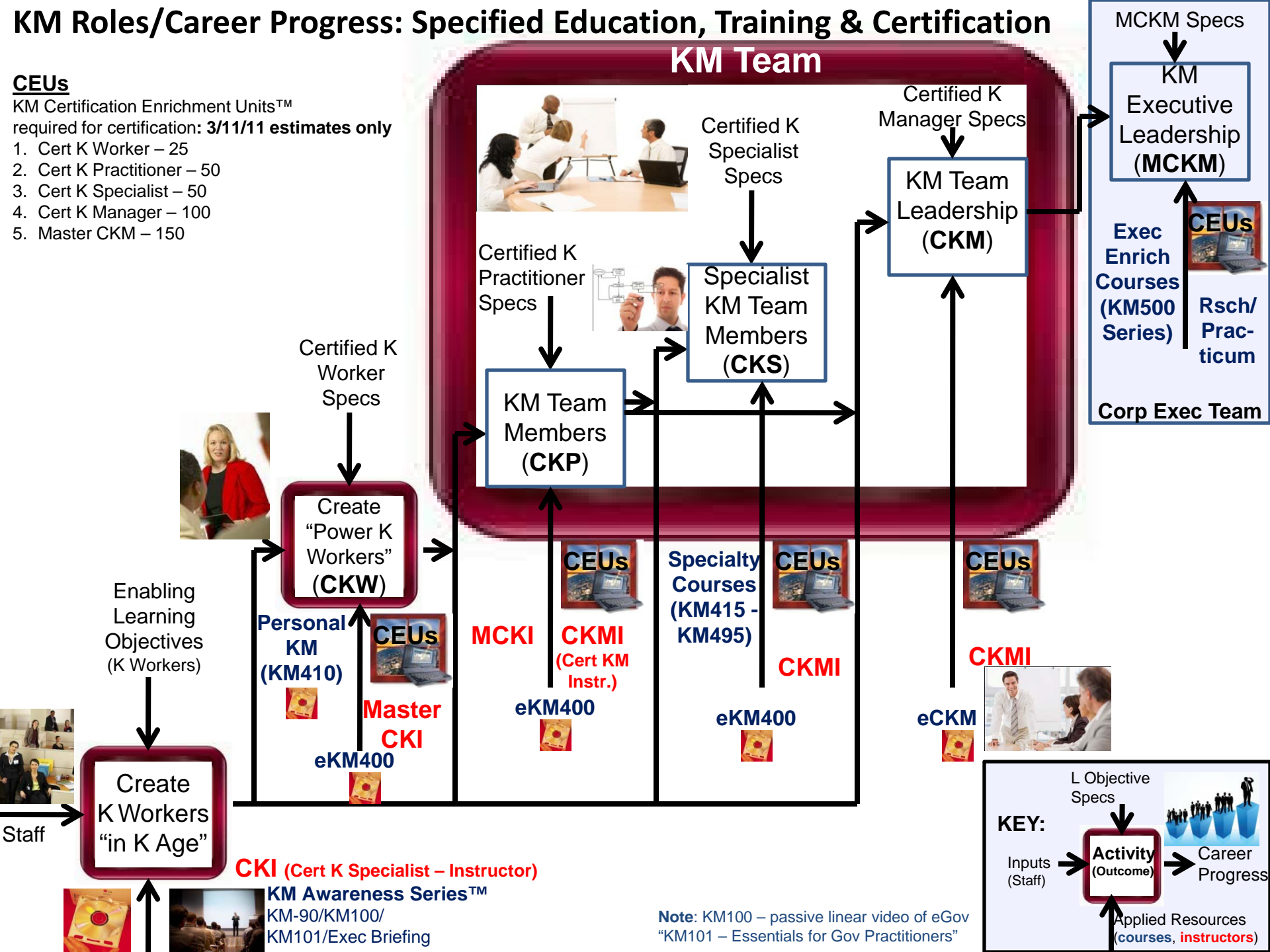
Guiding Principles



Key Reference Documents

KM Roles/Career Progress: Specified Education, Training & Certification

- CEUs**
KM Certification Enrichment Units™
required for certification: **3/11/11 estimates only**
- 1. Cert K Worker – 25
 - 2. Cert K Practitioner – 50
 - 3. Cert K Specialist – 50
 - 4. Cert K Manager – 100
 - 5. Master CKM – 150





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www.kminstitute.org

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