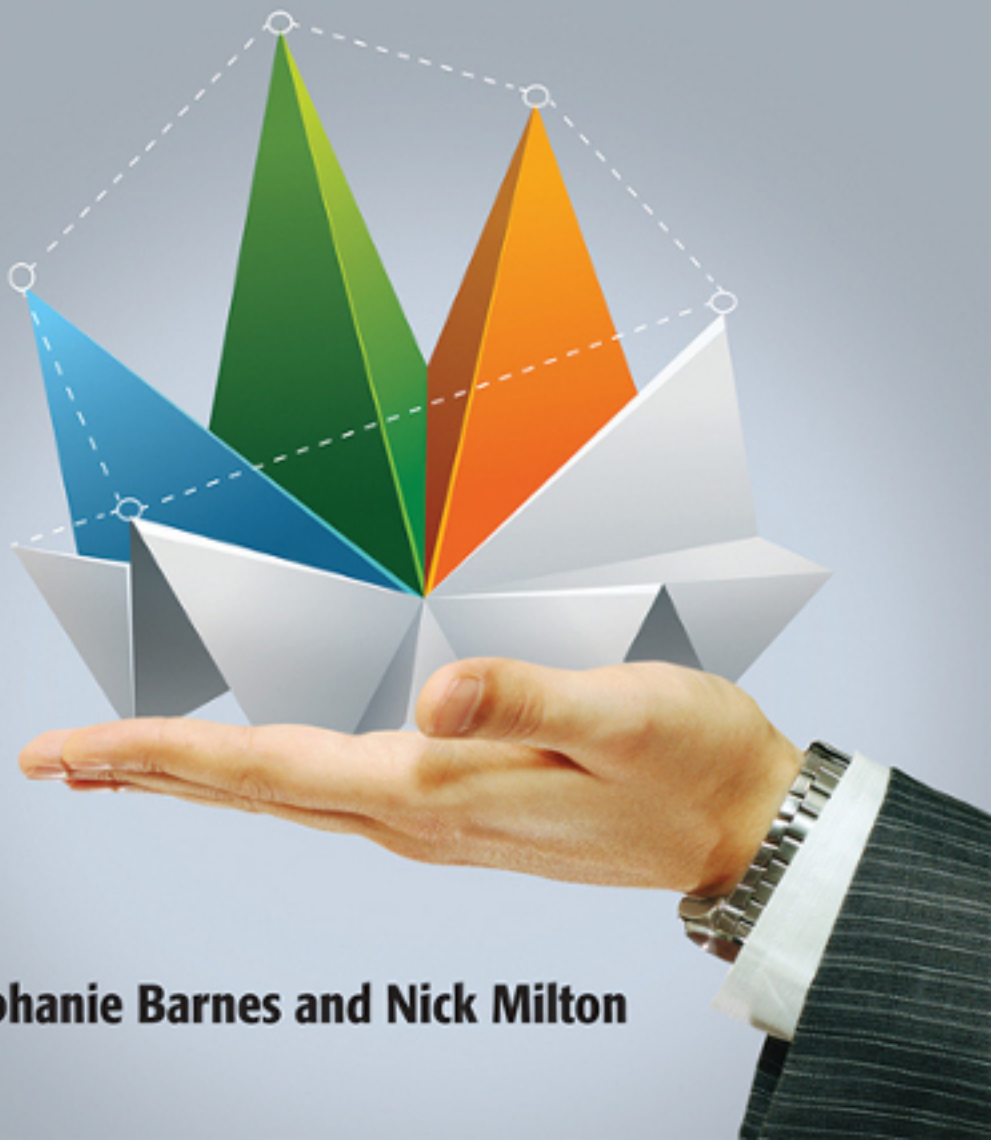


# DESIGNING A SUCCESSFUL **KM** STRATEGY

A Guide for the Knowledge Management Professional



**Stephanie Barnes and Nick Milton**

## **PRAISE FOR *DESIGNING A SUCCESSFUL KM STRATEGY***

"This book is dedicated to knowledge managers everywhere. In that generous spirit, it delivers essential tools for success: guidance on how to devise a knowledge management strategy that truly serves your organization's needs, as well as tactical advice for applying your strategy to generate positive results for your organization."

—V. Mary Abraham, *Above and Beyond KM*

"Barnes and Milton have used their experience as KM practitioners and consultants to write an immensely practical guide for knowledge managers. Creating a good KM strategy should lead to a successful KM program."

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"Provides a holistic framework to guide the design of a meaningful and manageable KM strategy. This book strikes a useful balance between art, science, and an organization's strategic and operational priorities."

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Stephanie Barnes and Nick Milton



**Information Today, Inc.**  
Medford, New Jersey

First printing

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organization, industry, and sector on every continent.

May all your strategies be successful!



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—Stephanie Barnes

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—Nick Milton





# Foreword

My most recent experience in Knowledge Management came over a 10-year period with a major global oil and gas company. For this international energy company with thousands of job sites (often quite remote) spread across 30 countries, the challenge of sharing knowledge was very real—and the potential payoff was huge. Facing fierce competition on all fronts, senior managers realized that to continue on its success trajectory, the company needed to rapidly and effectively harness the knowledge of its highly skilled but geographically distributed workforce. Instead of assuming that technology either was the solution or was irrelevant to knowledge management, senior managers understood that effective global Communities of Practice required new processes, roles, cultures, and technologies. Moreover, they recognized that each Community of Practice had to be focused on solving difficult business challenges, and that the entire Knowledge Management program needed to be “based in the business” to be successful in the long run.

Ensuring that each individual Community of Practice has the greatest chance to succeed is a process that begins long before the community is formed. Many authors and consultants stress the informal nature of such communities, arguing that any attempt to systematize them will crush them. We found the exact opposite—that without clear and explicit links to the organizational strategy and its business purpose, communities often evolve in ways that fail to contribute to business goals. We developed two fundamental principles in this regard.

Firstly, no Community of Practice was created without a clear and detailed business case that specified the value proposition to the

company; community leaders and members agreed upon this business case. Insisting on a business case prior to the creation of a Community of Practice goes against the typical “let a thousand flowers bloom” approach that is often promoted in the Knowledge Management literature. But in many cases, uncontrolled growth of new communities saps employees’ attention and engagement, and leads to neglect and community failure. Setting a strategic goal at the outset means that every potential new community must have a strong business justification, which signals to potential leaders and members that the result will not be something that consumes their time without producing real business value. Community members, in turn, see this phenomenon and this drives a higher level of engagement since most employees have laudable amounts of professional pride.

Proposals for new Communities of Practice also clearly had to specify the kinds of deliverables that would be produced through the ongoing operation of the community, and the specific kinds of activities that the community would be supporting. Deliverables (such as research reports and reusable work products) and activities (such as electronic discussions and teleconferences) needed to relate directly to the business case and support the attainment of business strategy. A high degree of focus on these two areas helped separate the wheat from the chaff, leading new community proponents away from fuzzy “more is better” claims about collaboration and toward specific activities that were likely to produce a solid payoff for the collective investment of time.

Ultimately, managers provided each new Community of Practice—through its business case, its deliverables, and its activities—with a clear operating model that connected it to the overall strategy of the business. Following these two principles had a profound effect on the nature and character of communities at this large global company: it aligned them with organizational priorities, helped members understand how they can affect important business goals, provided clear justification for why members should invest their time in the community, and shifted the idea of Knowledge Management away from abstract concepts and toward a concrete set of measurable objectives. As a

result, communities became a cornerstone of this company's strategic ability to reach its business goals and deliver additional value through global collaboration and expertise sharing.

The key to getting any Knowledge Management program off to a promising start from a business value standpoint is to strategically address the Knowledge Management opportunities. Knowledge Management should always start with discovering what the business is interested in accomplishing. This is not just the immediate business group or function grappling with Knowledge Management, but also should include alignment all the way to the top of any organization. Alignment creates the opportunity for purposeful collaboration where value can be created and sustained over time. The challenge is often that organizations cannot easily figure out how to set out on a path to create measurable and sustainable value. Smart managers intuitively understand the importance of the problems that Knowledge Management efforts are often designed to address. However, the lack of strategic awareness often results in poorly organized Knowledge Management efforts that are sprinkled across a decentralized construct and not implemented consistently across an organization to ensure standards and best practices are being leveraged with business value in mind.

To ensure Knowledge Management is strategic and linked to business value, organizations need to ensure there are strong relationships between those in charge of implementing Knowledge Management and business leaders. While smart managers can understand how Knowledge Management can support business issues, they cannot get to an intimate understanding where they are ready to embrace Knowledge Management solutions until the necessary work is done to show the linkage between purposeful collaboration and the solution of critical business issues. Knowledge Management practitioners must be able to employ techniques such as those described within this book, to make the connections between Knowledge Management and business value opportunities. This is where the business relationships come into play since it is only with strong relationships that a Knowledge Management practitioner can convince business leaders to try these and other techniques to make these imperative linkages.

Knowledge Management success requires a commitment by management to actively support collaboration so that employees feel that it is part of their “day jobs” and to ensure a standard means to share with their colleagues. It is possible to design easy and efficient technology-enabled processes that focus on connecting people as part of their daily work, to enable the seamless flow of lessons learned and best practices to the right people at the right time. Showing managers that this approach to knowledge transfer maximizes employees’ efforts to solve problems is the key. Any corporate culture will always be particularly sensitive to anything perceived to be an additional burden, and one clear sign of Knowledge Management success is that KM activities are not viewed in this manner.

At this writing, Knowledge Management is “hotter” than ever. Organizations across all sectors and industries are scrambling to figure out how to get more connected workforces. There is ample evidence that a focus on collaboration is a critical enabler for the future of any organization, just as there is ample proof that Knowledge Management—when strategically implemented in alignment with business value—enables organizations to build greater levels of openness and trust, which, in turn, improves employee collaboration and the sharing of valuable best practices and lessons learned. That type of sharing is the heart and soul of Knowledge Management, and the Knowledge Management strategy is the foundation stone for making this happen.

In *Designing a Successful KM Strategy* you will find a straightforward and practical guide to the creation of a clear, simple, and business-focused Knowledge Management strategy. As we found in the oil and gas company described earlier, this is your first step to delivering the huge value that Knowledge Management makes possible.

Dan Ranta  
Director, DR Consulting

# Introduction

*Designing a Successful KM Strategy* is designed for you, the knowledge manager, in order to help you develop a strategy for Knowledge Management (KM) that will not only allow you to be successful in implementing KM in your organization, but also give you a solid understanding of why it is important to start with a strategy rather than jumping in without a well thought-out plan.

The introductory chapters describe KM, and share what we believe to be the basic principles behind successful KM implementation, based on our observation of, and involvement in, KM programs over the past 20 years.

Subsequent chapters take each section of our recommended KM strategy structure and explain what they should contain, and provide you with approaches and exercises for creating the relevant component of your own strategy.

The idea of writing a strategy is a simple idea, but don't think for a minute that this will be an easy undertaking. Writing a KM strategy is going to require a lot of thinking, a lot of discussing, a lot of socializing of ideas, and a lot of input from the most senior people in your organization as well as from frontline staff. If done well, it will provide the foundation for a highly successful KM implementation. A good strategy more than repays the time taken to write it.

The process of developing the strategy is summarized in Figure 0.1, and this flowchart can be used as an overview of the contents of *Designing a Successful KM Strategy*.

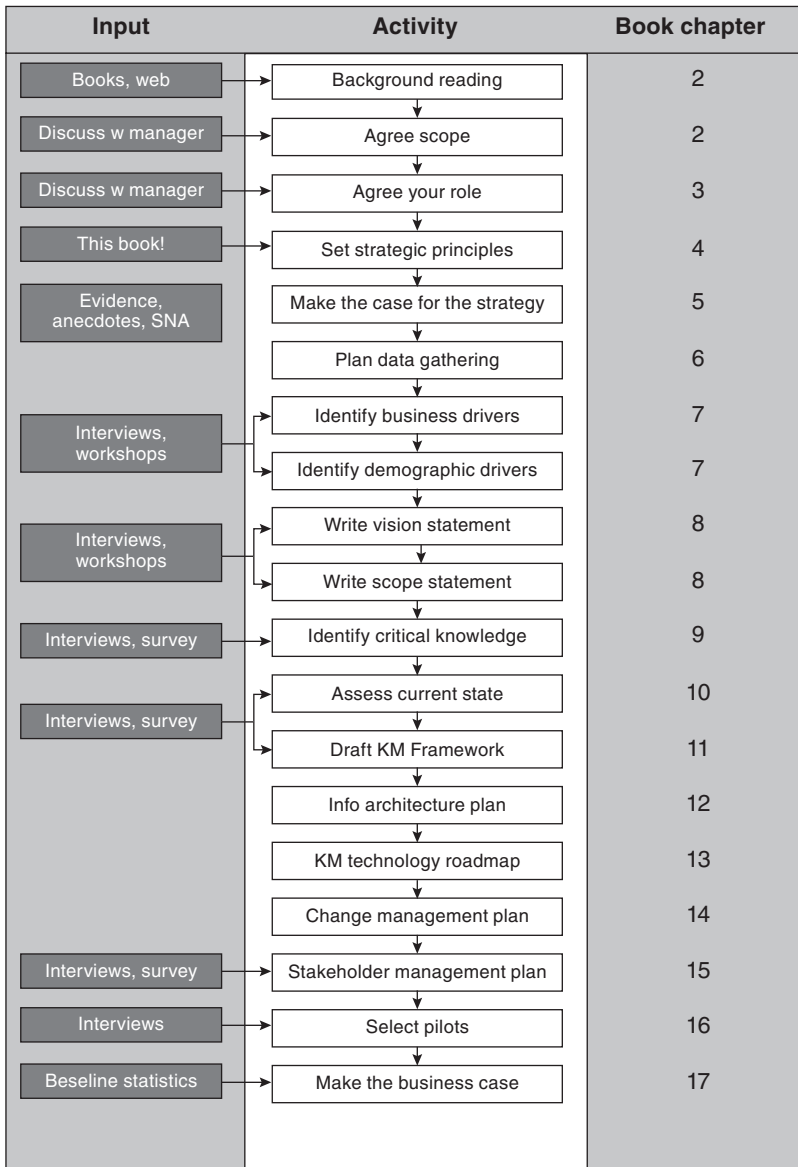


Figure 0.1 Flow diagram for writing a KM strategy

## The Need for Strategy

*“Strategy without tactics is the slowest route to victory.  
Tactics without strategy is the noise before defeat.”*

—Sun Tzu

Anyone interested in the way business works should watch the popular TV program “The Apprentice.”<sup>1</sup> This is a reality game show, where teams of young entrepreneurs are given business tasks, then compete against each other to complete the tasks in the most effective way. The losing team will lose one of its members each week—“fired” from the program as the numbers are whittled down to eventually determine the winner. The tasks vary from episode to episode, as do the reasons for the failure of any one team. Analyzing these reasons will provide you with a very instructive primer in how to succeed in business.

The seventh episode of the 2012 UK series threw the issue of business strategy into very sharp focus. The primary task was to buy goods from a warehouse and sell them at a market stall. The team that held the most cash and stock at the end of the day was the winner. One team leader took a very strategic view. His strategy was “stock the items that sell the best, and where demand is greatest.” Quickly he determined the key item that sold well and delivered a good margin (it was a slightly tacky-looking bottle of self-applied fake tan lotion), and set about acquiring as much stock of this product as he possibly could. The other team was project-managed by a young woman with huge levels of energy and enthusiasm, and excellent selling skills, but who had little time for strategy. Instead she reacted tactically to what was on the warehouse shelves, and spread her resources around several products. Not surprisingly, the strategic leader won the task, and the tactical leader lost. The tactical team was good at selling, but to paraphrase Sun Tzu, its sales tactics were just the noise before defeat.

What if, instead of selling fake tan lotion at a market stall, you were implementing KM in an organization? Do you still need a strategy?

Of course you do. You may not be in a reality game show, but you are in a competitive situation. You are in competition for internal resources and internal attention. If you do not have a good strategy then good tactics are



not going to save you. You should not be in the position of responding tactically to items on the “KM warehouse shelves,” rather, you should know what your business needs KM to deliver and focus on where the demand is greatest. We are constantly hearing of yet another KM program closed, and yet another knowledge manager looking for a job, as the company sought to cut back on spending. If you are not seen to be addressing the firm’s crucial operational issues and supporting its strategy, then you may be viewed as optional, and times are too tight for optional expenditures.

It is commonly stated that 80 percent of KM programs fail. Whether that high failure rate is close to accurate depends on what you mean by “KM program” and how you judge failure; that said, there certainly have been many failed KM programs. Some of the common reasons for failure include:

- KM is not introduced with an operational focus
- KM is not introduced as a change program
- The KM team does not have the right people to deliver change
- The KM team “preaches only to the choir” rather than engaging all the key stakeholders in a managed way
- Only parts of the KM solution are implemented, rather than the entire framework
- KM is never embedded into the organization’s processes and activities
- There is no effective high-level sponsorship

A good KM strategy will help you avoid these pitfalls; the chapters in *Designing a Successful KM Strategy* address all of them. A strategy is “the art of distributing and applying means to fulfill the ends;”<sup>2</sup> your KM strategy must make those ends clear, and help you determine and deploy a means to meet those objectives.

Throughout *Designing a Successful KM Strategy* we conclude most of the chapters with an example taken from one of several public-domain KM strategies to illustrate the points we make in that chapter.

## What Will a Sound KM Strategy Do for You?

A sound KM strategy will help you define where you are heading, and what the end point should be. The process of defining the vision and the objectives for KM within your organization will require a set of vital scene-setting conversations with business leaders and the development of a common understanding of the value KM can deliver.

Your strategy will provide a set of principles or ground rules to guide your actions, and guide your decision making during KM implementation, in order to create the greatest chance of success and help you avoid the reasons for failure we have already listed.

Your strategy, if it follows the principles mentioned previously, will be closely linked to your organization's objectives, strategy, and results. This will help protect you from being seen as peripheral to the operations, and thus an easy target for downsizing.

Your strategy will form the framework for planning purposes. It will define the areas of focus, the risks to be addressed, and the allies to work with, as well as the areas of greatest risk.

Your strategy will guide you in deciding what not to do. If a tactic is outside the framework, or in opposition with the principles, then it is not strategic but rather a waste of resources.

The strategy also looks at implementation priorities and issues. It is not just a vision; it is a high-level approach to how the vision will be realized.

Your strategy is a public agreement with your leadership. It represents agreed ground rules for KM implementation, and will have leadership's blessing and support. If over time that support wanes then you can go back to the strategy, remind your leaders that it was agreed upon, and claim their support (or renegotiate the strategy). The strategy is a key decision point for the organization.

Your strategy allows you to be flexible in your KM program, but in a managed way. As your organization changes, driven by changes in your organizational priorities or in the competitive or technological landscape, your KM strategy may also need to change, but all changes will need to be renegotiated with your steering group. This is your "Management of Change" process for the KM implementation.

## What We Won't Cover

*Designing a Successful KM Strategy* is a guide to writing a KM strategy tailored to the needs of your organization and to your organizational context. It will not tell you what KM framework you need; that is something you'll design yourself. It will provide the headings, or the overall structure of the framework, but not the details of the content, which will be different for each organization.

Neither will the book attempt to tell you how to implement your strategy. To include detailed guidance on KM implementation would have at least doubled the length of our text, and the details of implementation will vary considerably depending on your organizational size, diversity, and geographic spread. *Designing a Successful KM Strategy* is designed to help you create a foundation for success in KM through helping you craft the best possible strategy. Building on that foundation is something you will need to do yourself.

## Let's Get Started

We've now considered the value of strategy, and established that an effective KM strategy, aligned with your organization's larger strategy, is the basis and foundation for the success of your KM initiative. So let's move on to Chapter 1 of *Designing a Successful KM Strategy* and begin our work!

## Notes

1. "The Apprentice (UK TV Series)," Wikipedia, [http://en.wikipedia.org/wiki/The\\_Apprentice\\_\(UK\\_TV\\_series\)](http://en.wikipedia.org/wiki/The_Apprentice_(UK_TV_series)).
2. B. H. Liddell Hart, *Strategy*. 2nd Revised ed. (London: Faber, 1967), 321.

# About the Authors

Stephanie Barnes has over 20 years of successful experience in KM and accounting in the high technology, health care, and public accounting sectors. She is currently a Knowledge Management consultant at Missing Puzzle Piece Consulting, where she focuses on aligning people, process, and technology. She works with clients in financial and professional services, as well as in the high-tech industry and the non-profit sector, among others. She has been doing KM work for more than 14 years and is the Knoco Ltd. franchisee for Canada.

Stephanie graduated from Brock University with a BBA in Accounting and from McMaster University with an MBA in Information Technology. She is ITIL Masters certified as well as having a Business Systems Analysis certificate. In May 2011, Ark Group published Stephanie's report, "Aligning People, Process, and Technology in Knowledge Management."

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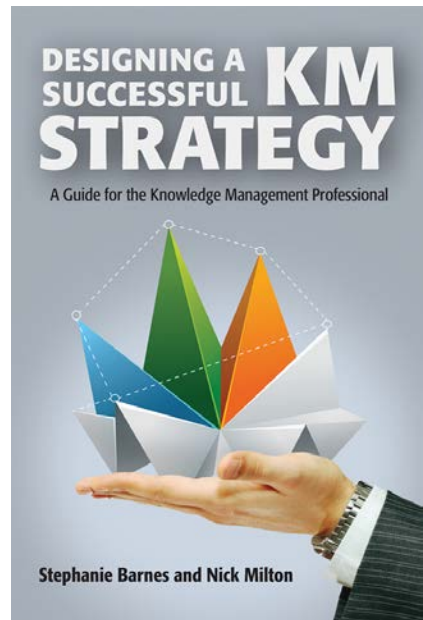
Dr. Nick Milton is director and co-founder of Knoco Ltd., with over 21 years working in Knowledge Management. At Knoco, Nick has helped develop and deliver KM strategies, implementation programs, and KM services in a wide range of different organizations around the globe. He has a particular interest in Lessons Learned programs, and has managed major lessons capture programs, particularly in the

area of mergers & acquisitions and high technology engineering. He is the author of *The Lessons Learned Handbook* (Woodhead Publishing, 2010) and *Knowledge Management for Teams and Projects* (Chandos Publishing, 2005), and co-author of *Knowledge Management for Sales and Marketing* (Chandos Publishing, 2011) and *Performance Through Learning—Knowledge Management in Practice* (Elsevier, 2004).

Prior to founding Knoco, Nick spent two years at the center of the team that made BP the leading KM company in the world, acting as the team knowledge manager, developing and implementing BP's knowledge of "how to manage knowledge" and coordinating the BP KM Community of Practice.

Nick blogs most days at [nickmilton.com](http://nickmilton.com) and can be found on Twitter @nickknoco. He lives near Bath, UK.

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