

Roadmap for Your KM Journey

Context

A 'roadmap' is commonly used to provide a 'big picture' view of a new or complex initiative, program or 'journey' for an organization. In simple terms, it shows stakeholders and other interested parties the strategy and tactics for getting from 'here to there'. Greenes Consulting has used the roadmap concept to help shape the thinking of KM service providers as they go about assessing, designing, developing and implementing KM strategy for an organization. It is crafted and honed from our experience on approximately 50 KM interventions with public and private sector organizations over the last 15 years

Purpose

This roadmap has been developed to help guide people and organizations on their KM journey, where their intent is to use KM as a business lever for business performance. It lays out the fit and flow of key elements needed for establishing, delivering and sustaining KM for an organization. It is applicable whether the KM 'service' is provided internally or externally to improve an organization's performance. It is intended to serve as a simple, but comprehensive, guide and checklist. However, it is not a formal project plan, and it is certainly not a cookbook that provides the perfect recipe. The KM Roadmap reflects an iterative and fluid process, where learning as you go is a key factor for success. It is also useful for creating awareness, buy-in and alignment, and helps manage expectations among stakeholders that will be touched along the journey.

5 Key Elements

The key elements that make up the Roadmap are common to any business planning and development effort. They are: **business context, analysis, strategy, planning, organization and delivery.**

Understanding and appreciating the Business Context of an organization is the first step. Since KM is a means to end, understanding the strategic and operational objectives of the business ensure any KM efforts that are undertaken are aligned with, and in support of, the intent of the organization. Much of the information needed to understand the business context can be found in company annual reports and strategic and operational business plans. However, engaging key stakeholders of the organization in conversations about their intent for the company will often provide insights on the most important business areas or 'high nails' to focus KM service efforts. These conversations are used to probe for high priority business performance improvement needs, which then create opportunities for the KM service provider to raise and explore potential KM benefits with the 'client'. This is when examples of KM business cases are often introduced to show what's possible when it comes to KM impacts to performance and growth. Engagements such as these also build relationships between the key business decision makers and the KM service providers an early stage. The information and insights gathered from business documents and conversations are used to create an initial KM value proposition for how KM services can contribute to the organizations performance goals.

In the Analysis stage, the future and current states of the organization are compared and assessed to identify gaps that can be closed by KM improvement services. If you are applying this approach to establishing or renewing a KM Business, the gaps are identified to show where you need to change to create the business you envision for the future.

The future state describes the Vision of where the organization wants to be. The current state describes where the organization is today. A common framework for description of both states is used to enable effective

comparative analysis. SWOT analysis is often performed at this stage to identify relevant strengths, weaknesses, opportunities and threats where KM could make a significant impact.

The results of the gap analysis are then used in the Strategy stage to develop a strategic approach to KM business delivery and appropriate 'campaigns' to position and direct the KM effort in the medium to long term. Critical success factors are explored and considered in the strategic thinking process, and best practices and lessons learned from other relevant KM experiences are factored in to develop strategic objectives and key metrics for the KM way forward.

Planning is then performed to turn the strategic objectives and measures into a set of high level, tasks, milestones and deliverables. KM business resource requirements are estimated based on market and/or specific client assessments (internal or external) of what it will take to deliver the KM effort. Market analysis can be used here to develop a plan to establish a 'standalone' KM Business, which usually has a much broader scope than a specific client project. In this case, significant effort is put into developing plans for marketing and branding the KM Business.

Form follows function and the planning information is then used to create the Organization structure that will best support the KM service & support requirements. This stage involves basic office operations set-up to staffing and more detailed planning of tasks and deliverables in short- to medium-term timeframes.

The Delivery stage is where the rubber meets the road. It involves deep engagement with a client on a specific opportunity, professional and detailed planning of KM tasks and deliverables, and the operational management and execution of the KM project or program. Change management is a key factor in successful delivery of any KM effort, and typically goes beyond training and communication to address behavior change required for knowledge sharing and actual transfer and application.

Performing and Learning occur throughout the KM journey to ensure the most current knowledge and experience is leveraged to maximize performance. However, these activities and their desired results do not happen unless processes for learning before, during and after (such as Peer Assists, Action Reviews and Retrospects) are established as part of the KM plan. When made a part of the way work gets done, application of the learning processes provides both continuous and discontinuous improvement to any KM effort.

Please let us know how the Roadmap worked for you, or if it left you wanting in any way. Your feedback will help us make it even more useful for future KM journeys!

KM Roadmap

