Creating Value From Knowledge To Drive Program Management Success

Knowledge at the Point of Execution®
Desired Outcomes/Course of Discussion

• Understand How Knowledge Management (KM) Can Facilitate Program Management (PM) Success

• Understand Some KM-PM Fundamentals Tied to Performance

• Introduce the “Performing and Learning Model” within the PMO Context

• Work Through Some KM Templates and Tools

• Provide a Solid Foundation for Integrating KM and PM

• Answer Your Questions
Business Case for Knowledge Management in a PMO

Capture the Knowledge
The verdict is in: A formal knowledge transfer process helps deliver better project outcomes, according to PMI’s 2015 Pulse of the Profession®: Capturing the Value of Project Management.

Three out of four
High-performing organizations—those that complete 80 percent or more of projects on time, within budget and meeting original goals—have a formal knowledge transfer process in place.

Only 35%
of low-performing organizations have a formal knowledge transfer process in place. (Low performers complete 50 percent or less of projects on time, within budget and meeting original goals.)

These organizations are almost three times as likely to have a formal knowledge transfer process in place.

92% vs. 33%

BUILDING BUY-IN
Organizations report that the primary barriers to effective knowledge transfer are:

52% Too many higher priorities
42% There is insufficient recognition of the value

96% of organizations that are most effective at knowledge transfer have an organizational culture that values it, compared to 10 percent of the least effective organizations.

The most effective organizations are three times more likely to report that the project management office (PMO) owns knowledge transfer.

A SECRET TO SUCCESS

95% of organizations that are most effective at knowledge transfer identify someone who has ultimate responsibility for knowledge transfer.

Only 54% of the least effective organizations do the same.

DOING IT WELL

One in three unsuccessful projects is severely affected due to an untimely or inaccurate knowledge transfer.

DRIVING PROJECT RESULTS

<table>
<thead>
<tr>
<th>PROJECT OUTCOME</th>
<th>MOST EFFECTIVE KNOWLEDGE TRANSFER PRACTICES</th>
<th>LEAST EFFECTIVE KNOWLEDGE TRANSFER PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet original goals/business intent</td>
<td>82%</td>
<td>62%</td>
</tr>
<tr>
<td>Completed on time</td>
<td>74%</td>
<td>47%</td>
</tr>
<tr>
<td>Completed within budget</td>
<td>75%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Source: PMI, June 2015
Intersection of Program Management and Knowledge Management
Definitions

• **Program Management**
  – (PMI) A group of related **projects managed in a coordinated way** to obtain benefits and control not available from managing them individually

• **Knowledge Management**
  – (Bill Kaplan) Capturing, adapting, transferring and reusing critical and relevant knowledge to improve performance at the individual, team, and organization level;
  – Flow and use of knowledge
  – A business discipline
Integrating Program Management and Knowledge Management

- Integrates the concept of “performing and learning”
- Real time capture and reuse of critical and relevant program knowledge
- Part of program management office (PMO) processes and workflows, not an extra project
- Driving continuous performance improvement into project planning and execution
- Leverage the learning of the PMO, users, and stakeholders to deliver user requirements and mission outcomes
PMO Knowledge Framework

• Team accessible rapid access to program knowledge
• Connects PMO across projects and disciplines
• Provides capability for real time collaboration
• Core Knowledge Base
  – Knowledge gained during program planning and execution
  – Repository of key insights and lessons learned not normally codified for reuse
• KM concepts, strategies, and implementing practices
How a Knowledge Enabled Program Management Office (PMO) Might View Knowledge and Experience

• Information sharing isn’t good enough – people need to make sense of information and experience, adapt it and use it to make the best decision at the right time.

• Create a framework for sharing experience and insight, supported by enabling technology, that enables people and project teams to search for, access and reuse the right knowledge at the right time.

Value Proposition for the Program Management Professional
Some Fundamental KM Concepts Tied to Performance
Defining Knowledge in Your PMO
Data – Information - Knowledge

Data
“0930UA0010”

Information
“United flight 0010 leaves Toronto at 1345 from Gate 32A

Knowledge
“That flight is always delayed and often cancelled”

Relationships and trust are required for knowledge transfer and re-use
Change Drives Knowledge Needs

- Determines kind of knowledge needed to mitigate the impact of change and the critical event on the normal operating performance of the organization.

- Organizations that can effectively leverage their knowledge will shorten not only the severity of the impact, but also the duration of the impact.
Risk to Mission Delivery!

Change Drives Knowledge Needs

- Changes in leadership
- Relocation of Operations
- New missions introduced
- New processes introduced
- Reallocation of duties
- Reduction in Force/Resources
- Legal/regulatory changes
- Workforce Turnover– Knowledge Loss

Performance Level

Severity

Duration

Time

Change Occurs Here

KM Mitigates Impact

Normal Performance Level

© Working KnowledgeCSP
Workforce Turnover and Loss

• People loss = knowledge loss

• Who: leadership and workforce

• Causes: retirement, promotion, career change, job change, downsizing, dismissal

• Impacts
  o Losses in productivity
  o Increases in performance cycle time
  o Reduced quality
  o Reduced consistency in practice
  o Reduced ability to successfully adapt to change

Risk to Mission Delivery!
“Operating Faster than the Speed of Change”

PMOs that adapt to change well:

• routinely capture and retain critical and relevant knowledge

• can access “the know how and know why” of the decisions they have made about how they have addressed challenges and opportunities in the past

• have enabled an ability for their workforce and leadership to “connect, collect, and collaborate” in addressing these challenges and opportunities

• possess the ability to respond quickly to “right the ship” or take advantage of an opportunity to drive a better outcome
Understanding How the PMO Environment and Workforce Dynamics Drive KM Success

- Knowledge Leadership
- Collaboration Culture
- Learning Before, During, and After

This is behavior change!
Understanding How Knowledge is Used and How It Flows Within Your PMO

• Where do you store your “knowledge and why is this important?”
• How easily does it “flow” across your PMO?
• How would you describe “knowledge sharing” within your organization?
High Performing Knowledge Enabled PMO

People

- People share what they think others need to know
  - High Trust
  - Partnering Mindset
  - Communities of Practice
  - Focus on conversations
  - Leadership demands collaboration

The latest know-how and experience is routinely embedded in strategy and operations
- Learning before, during, after
- Knowledge enabled processes
- Process, execution, training are aligned

Process

Technology

People and their collective knowledge are secure, yet highly visible and easily accessible
- Common sense security
- Accessible networks
- Expertise location
- “Content is King”
- Search optimized
Understanding the Value of a KM Strategy for Your PMO

• What is a KM Strategy?
• Why do you need one?
• How do you use the KM strategy?
• How do you know if you are achieving your KM strategy?
Understanding Why Implementing KM is a Change Management Effort

- What is changing?
- What are the “change” challenges?
- What can you do to begin to effect the necessary change?
Why and How KM Must Be Built Into How You Work

- “Critical and relevant” knowledge
- Value of codifying your work processes
- KM must be viewed as part of the way work gets done and not as an extra task
- Value of learning before, learning during, and learning after
- Value of Communities of Practice to move knowledge cross the PMO
Understanding Some Basics for Success

• There is long term value in capturing and reusing knowledge—it’s about mission performance!

• Recognize that it is a long term commitment to build and sustain a knowledge enabled organization

• Knowledge capture and reuse must be a routine part of the way you work

• Look for a place to start where it will have a significant impact on performance

• Focus on the people and the processes necessary to move knowledge across your PMO -- not the technology -- it’s about changing behavior!

• Understand the multi-generational mix of the PMO workforce

• Leadership must be committed to investing time and resources to improve the ability of the PMO to capture, adapt, transfer, and make knowledge (learned lessons) findable, accessible, and reusable
Knowledge Leadership

The ability of an individual or group of individuals (leadership & workforce):

- to create value from knowledge held by the organization within an environment that recognizes and rewards knowledge capture, knowledge retention, knowledge reuse and collaboration

- to make this behavior a part of the organization’s processes, practices, and culture so that it is not viewed as an extra task...it is “what we do as part of the way we work”

- to address the challenges of creating a high performing and knowledge enabled organization

- to tie knowledge retention (capture and reuse) to succession planning and practices
Sustaining the KM Effort

• Knowledge Leadership

• Demonstrating the Value of KM in Achieving Mission Success

• Tying Measurable Performance Improvement and PMO Success to the KM Investment Recognizing and Communicating KM Success
Knowledge Management for PMOs
Performing and Learning Model

• *Fast* Learning

• Peer Assist

• Action Review

• Retrospect

• Communities of Practice

• Knowledge Assets (Core Knowledge Base)

• Enabling Technology
Performing and Learning Model

Capture and Sense Making
- Learning Before (Peer Assist)
- Learning During (Action Review)
- Learning After (Retrospect)

Fast Learning

Enabling Technology
- Collaboration Tools
- Expertise Location
- Secure Access

Knowledge Assets
- Community Knowledge
- Electronic Mentor
- Accessible and Reusable
- Peer Reviewed

Communities of Practice
- Leadership Support
- Driven by Practitioners

Retain and Reuse

Connect

Collaborate

© Working Knowledge CSP
Communities of Practice

Knowledge Asset Core Knowledge Base (Knowledge Repository)

Plan ➔ Execute ➔ Review and Assess

Learning Before
What do we know about what has been done before?

Learning During
What are we learning as we perform and execute?

Learning After
What new learnings and experiences can we share?

New projects use current, proven processes and “better” practices

New practitioners are taught using latest knowledge

“Better” practices emerge as the workforce validates and renews the learnings and experiences
Tacit vs. Explicit Knowledge
(Unconscious vs. Conscious)

• Unconscious Tacit
  – Deep knowledge. Things you don’t know you know.
    Instincts. Gold dust!

• Conscious Tacit
  – Things you know you know, things you tell others

• Explicit Knowledge
  – Written, codified, stored
Two Assertions About Capturing Tacit Knowledge

• A human questioning process is the most effective way of making knowledge conscious

• A team of people has more collective unconscious knowledge than the sum of the individuals
Fast Learning Transforms the Way We Work

Knowledge

Fast Learning Curve

Where I Am

Where I Want To be

Fast Learning

Peer Assist

Fast Learning Retrospect

Doing Curve

\[ \Delta t \]

Time

© Working Knowledge CSP
Peer Assist
Peer Assists: Learning Before Doing

Key Benefit

Executing the improved project plan yields a level of performance over and above what otherwise would have been achieved.

- Targets a specific business challenge
- Plan improvement through peer interaction
- Identifies new possibilities & questions

What you know (Visiting Peers)

What’s possible?

What we both know

What I know (Home Peers)
Peer Assist

Assist = Help ≠ Review

A meeting of peers that:

– targets a specific challenge
– is early enough for it to make a difference
– imports knowledge from people outside the team
– identifies possible approaches and new lines of inquiry
– promotes sharing of learning with each other
– develops strong networks amongst staff
Mutual Benefit

• People are much more open with their peers

• They are much more willing to share and to listen

“…both teams learn from the effort; the assisting team returns home with a broader knowledge base...and the inviting team is able to use the lessons learned.”
Peer Assist Summary

- It targets a specific challenge
- It’s early enough for it to make a difference
- It imports knowledge from people outside the team
- It identifies possible approaches and new lines of inquiry
- It promotes sharing of learning with each other
- It develops strong networks among practitioners
Action Review
A Tool for ‘Learning As You Go’

Evolved from the US Army “After Action Reviews”, adapted to fit a non-military environment

- Short-term, small team
- By the team, for the team
- Takes about 15 minutes
- Makes learning conscious
- Can make learning explicit
- Builds trust
Action Review Structure

• What
  – The piece of work just completed

• Who
  – The team and no-one else

• When
  – Immediately after the work is finished

• Where
  – At the workplace
Action Review Rules

• Openness, not hiding.

• Leaders lead on equal footing.

• Learning, not blame or evaluation.

• Everyone involved takes part.

• No outsiders.

• Real issues, not “the time the coffee arrived”.
Four Questions

• What was supposed to happen?
• What actually happened?
• Why was there a difference?
• What have we learned?
Q1 - What Was Supposed to Happen?

• What was the objective of the piece of work?
• Was there a clear objective?
• Was it measurable?
• Does everyone agree? Maybe there were different understandings.
• You could try asking people to write down what they thought the objective was
Q2 - What Actually Happened?

• What was the result?
• Was it measurable?
• Does everyone agree? What is “ground truth”?
• You are not looking for blame, or praise. This is not finger pointing.
• It will help if there is some sort of record of the proceedings
Q3 - Why Are They Different?

• Was there a difference between supposed and actual?
• Did you do better/worse than expected? Or did it all go to plan?
• What helped the success, or caused the failure?
• You may need to question quite deeply to find out the factors.
Q4 - What Can We Learn & Do About It Right Now?

• This is where you express the learning in terms of ‘what we will do in the future?’

• If any actions arise, make sure they are adopted
What Do You Do With the Output?

• Participants make notes for themselves
• Scribe takes notes of learnings for future collation
• Pass learnings on to other teams
• Make sure learnings are applied
Action Review Exercise

• Pair up with another participant

• One of you will play the role of AR facilitator and the other will play themselves
  – As the facilitator, lead the other person through the 4 questions. Limit the responses to just one item per question to facilitate getting thru the exercise in 15 minutes.
  – As yourself, your assignment is to respond to the 4 questions using your experience from a project or activity in which you are currently involved

• After 15 minutes, switch roles and repeat the exercise.
Retrospect
The Retrospect

• An end-of-phase event

• Facilitated

• Takes about 20 minutes per team member

• Makes learning conscious and explicit

• Allows closure
Retrospect | Action Review

• What
  – The project/phase just completed

• Who
  – The team, the project sponsor, a facilitator, and future “customers” for the knowledge

• When
  – Immediately after the project

• Where
  – Preferably offsite

• What
  – The piece of work just completed

• Who
  – The team and no-one else

• When
  – Immediately after the work is finished

• Where
  – At the workplace
Retrospect Rules

• Ensure the key players will be there

• Use a facilitator with strong facilitation skills

• If the sponsor’s attendance is not appropriate, try to get them to give some input on the result

• This is not to assign blame or praise but to ensure future projects go even better than this one

• Make sure you have some way to record what’s said

Position it as a celebration?
## Comparing Retrospect and Hot Wash

<table>
<thead>
<tr>
<th>Retrospect</th>
<th>Traditional Hot Wash</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Longer term</td>
<td>• Short term</td>
</tr>
<tr>
<td>• Conversation</td>
<td>• Briefing</td>
</tr>
<tr>
<td>• Always facilitated</td>
<td>• May be facilitated</td>
</tr>
<tr>
<td>• Focus on what was learned</td>
<td>• Focus on what happened</td>
</tr>
<tr>
<td>• Capture for reuse across the organization or enterprise</td>
<td>• Focus on responsibility</td>
</tr>
<tr>
<td></td>
<td>• Capture for analysis</td>
</tr>
</tbody>
</table>

© Working Knowledge CSP

Concept | Strategy | Practice
Knowledge at the Point of Execution®
Five Questions

• What was the objective of the project?

• What actually happened?

• What went well in this project? Why?

• What could have gone better? Why? Advice?

• How satisfied are you on a scale of 1 to 10?
Q1 - What Were the Objectives of the Project?

- Try to find the original terms of reference and measurables
- Circulate these before the meeting?
- Were there any unstated objectives?
Q2 - What Did We Achieve Compared Against the Objectives?

- Were deliverables delivered?
- Were deadlines met?
- Was the customer/stakeholder happy?
- At this point it could also be worth charting the process (find out what actually happened).
Q3 -What Went Well in This Project?

• Start with the positives
  – Successful steps towards meeting the objective.
  – Ask everyone to take 2 minutes to write down 3 things they identify as a success
  – Go around the table and ask them to read them out loud

• You use this as a lead-in to a questioning process
  – “Why did this (part) go so well?”
  – “What did you do to ensure it went well?”
  – “How can we ensure future projects go just as well?”
  – “If I were a future project leader, what would you advise me to do to achieve the same results?”
Q4 - What Could Have Gone Better?

• Now for the downsides
  – Pitfalls, things that held us back
  – Ask everyone to take 2 minutes to write down 3 things they identify as a disappointment
  – Go around the table and ask them to read them out loud

• You use this as a lead-in to a questioning process
  – “What happened to make this sub-optimal?”
  – “What was missing that meant this happened?”
  – “How can we ensure future projects go better?”
  – “If I were a future project leader, what would you advise me to avoid these outcomes?”
Q5 - On a Scale of 1 to 10, How Satisfied Do You Feel With the Way It Went?

- Ask everyone to mentally give their satisfaction rating, as ‘marks out of 10’
  - Go around the table and ask them to call out their rating.
  - This is a closure exercise; closure for the meeting and for the individuals.
  - You can question people further (“What would have made it a 10/10 for you?”), or question the anomalies.
  - It can be appropriate to ask for 2 ratings; one for the product and the other for the process.
What Do You Do With the Output?

- Summarize insights and recommendations
- Circulate to team members for approval
- Make available for future teams to learn before doing
Retrospect Summary

• An end-of-phase event
• Experienced facilitator is a must
• Takes about 20 minutes per team member
• Makes learning conscious and explicit
• Allows closure
Group Knowledge Capture Summary

• The questioning process is needed to reach the group’s unconscious knowledge

• Peer Assists, Action Reviews, and Retrospects are the tools that will uncover (tacit) knowledge and allow it to be captured and made sense of for reuse
Communities of Practice
Some Assertions

• Communities thrive when they are composed of people who desire to share and have a vested interest in a specific practice area
• They naturally form around practices, topics or activities where the power of collective know-how provides significant advantage or survival.
• When left alone to adapt as they need, communities of people evolve to one of the most effective channels for leveraging knowledge inside and outside an organization

"There is no power for change greater than a community discovering what it cares about."
Turning to One Another, Margaret J. Wheatley
CoPs
Channels for Cross-organization Knowledge Flow

Business unit 1  BU2  BU3

Hierarchical knowledge flow

Moving Knowledge Across Boundaries

© Working KnowledgeCSP
Why Communities Work: Effective Knowledge Transfer

Timely, trusted, highly relevant knowledge

Effective learning

"Experience is not what happens to a man. It is what a man does with what happens to him."

Aldous Huxley
CoP Value Propositions

• A community exists to enhance the performance of its members by:
  – Accelerating problem solving
  – Facilitating faster learning and timely knowledge transfer
  – Developing, maintaining and improving standards, common processes & procedures
  – Increasing autonomy, empowerment, risk taking
  – Increasing ideas and innovation
  – Encouraging personal development
    • Challenge existing knowledge and mental models
    • Unlearning
    • Increasing self-awareness and openness to learning
• If members benefit, then so will their organization
CoP Sources of Value

• **Visibility and Reuse**
  – What has been developed in one place can be useful in many others, if it were known and available

• **Mutual Support**
  – If somebody encounters a problem, they can count on the best knowledge of their peers, anywhere they may be in the corporation
  – The CoP may be one of the few sources of knowledge, mentorship and advice for and individual’s personal development

• **Company-Wide Learning**
  – We all learn from our experiences everywhere, just as each of us now learn from our own local experiences somewhere.

• **Collaborative Work**
  – If a problem is too complex for a single person, team and location, we can all put our heads together in tackling it

Which of these might excite potential members enough to invest their ‘spare time’ and energy to be part of your Community
Phases of CoP Development

- Feasibility
- Planning
- Forming
- Launch
- Continuity & Sustainment
Knowledge Assets
(Core Knowledge Base)
Knowledge Assets

• What is a **Knowledge Asset (KA)?**

• How does a KA fit into the **KM big picture?**

• What makes a **KA unique?**

• What does a **KA look like?**

• How does the workforce (PMO) **use and benefit** from KAs?
Knowledge Assets

• A repository of key insights, learnings and advice in the form of FAQs, guidelines, checklists, best practices and stories
• An index of the available knowledge in a specific area
• A link to a reference library of documents that might save you time
• A stake in the ground and a “memory aid” for the people with the knowledge
• A catalyst for finding the person(s) who knows and their contact details
• A prompt for in-depth, one-on-one, context-grounded conversations
Knowledge Assets

Exists to enhance the performance of teams and individuals by:

• Accelerating problem solving
• Facilitating faster learning
• Increasing autonomy, empowerment, risk taking
• Encouraging personal development

A Knowledge Asset is meant to help people think and make their own decisions, not to give them the answer
Where Does the Content Come From?

- **Peer Assists**
  - Learning that is shared among the peers in a PA session can be codified for incorporation into a KA. The raw material are the documents compiled from the flip charts of the facilitated session.

- **Action Reviews**
  - Some of the learnings gathered may provide content for the KA. Notes transcribed from the AR flip charts can be reviewed for significant recommendations.

- **Retrospects**
  - One of the 2 primary sources for the KA. The raw material is the documents compiled from the flip charts of the facilitated session.

- **Interviews**
  - The other primary source of the bulk of the KA. They provide an opportunity to collect personal insights and experience and to gather knowledge via rich media (audio and video). Often the interviewee participation in prior PA’s, AR’s and R’s provides a rich seed of themes for the interview.
Knowledge Assets

Look on a Knowledge Asset as:

- Something to help you think differently about the challenge and your decisions
- The business **Context** in which the learning occurred
- Key **Learnings** and insights in the form of FAQs, guidelines, checklists, best practices and stories – *both local and common*
- Guidance on what needs to be addressed at each stage of the **Process**
- Links to **People** who have the experience to contribute
- A reference **Library** of documents that might save you time
- **Feedback** from the end user to keep it relevant and alive
Knowledge Asset Features Review

- **Context** enables people to make sense of the content
- **Content** is based on actual experience
- **Targeted** to a particular audience
- **Focused** on a specific activity or subject /domain
- **Easy** to access
- **Searchable**
- End **user-friendly**
- **Owned** by the Community
Four Assertions on Knowledge Use and Transfer

- Knowledge needs to be packaged with the *end user* in mind
- People learn best via stories and sharing experience by people who have actually ‘done it’ or are ‘doing it’ -- communicates credibility and creates new knowledge
- Learnings are best illustrated by blending multiple voices
- Packaged knowledge needs to be kept current
Enabling Technology
Purpose of KM Technology

- To enable the PMO and our project teams to effectively and efficiently capture and reuse knowledge

- To enable our project teams to effectively deliver project requirements and mission outcomes

- By understanding the capabilities of current technologies, exploit them as a contributing factor in the evolution of a sustainable KM Framework

- To enable an ability to “connect, collect, and collaborate”
Enabling Technology
(Convergence)

IT Infrastructure

KM Enabling Technologies
- Connection
- Collection
- Collaboration

KM Enabling Technologies:
- Expertise Location
- Web-Based Knowledge Repositories (Knowledge Assets)
- Communities of Practice
  - Discussion Forums
  - Threaded Discussion
  - Face to Face

Knowledge Asset (Core Knowledge Base)

© Working Knowledge CSP

Working Knowledge CSP
Concept | Strategy | Practice
Knowledge at the Point of Execution®
Enabling Technology (Functionality)

<table>
<thead>
<tr>
<th>Capture, save, and reuse knowledge</th>
<th>Increase the efficiency and effectiveness of teams and business processes</th>
<th>Improve the quality and speed of making decisions</th>
<th>Enhance our intelligence and/or communications externally/externally</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Content Management</td>
<td>● Business Process Management and Workflow Automation</td>
<td>● Business Intelligence</td>
<td>● Customer, Competitor, and Supplier Intelligence</td>
</tr>
<tr>
<td>● Digital Asset Management</td>
<td>● Capture and Imaging</td>
<td>● Data Integration and Management</td>
<td>● Social Media Monitoring</td>
</tr>
<tr>
<td>● Document Management</td>
<td>● Case Management</td>
<td>● Data Mining</td>
<td>● Social Network Analysis</td>
</tr>
<tr>
<td>● Enterprise Search</td>
<td>● Collaboration &amp; Community Management</td>
<td>● Data Visualization</td>
<td>● Social Networking Platforms</td>
</tr>
<tr>
<td>● Records Management</td>
<td>● eLearning</td>
<td>● Modeling and Simulation</td>
<td>● Social Networking Applications</td>
</tr>
<tr>
<td>● Taxonomy, Classification, &amp; Metadata Management</td>
<td>● Innovation Management</td>
<td>● Risk Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Program and Project Management</td>
<td>● Statistics</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Websites and Portals</td>
<td>● Text Analytics</td>
<td></td>
</tr>
</tbody>
</table>
Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

Take a test ride—download a sample today:

www.realstorygroup.com/try
Communities of Practice

Knowledge Asset
Core Knowledge Base
(Knowledge Repository)

Plan
Execute
Review and Assess

Learning Before
What do we know about what has been done before?

Learning During
What are we learning as we perform and execute?

Learning After
What new learnings and experiences can we share?

New projects use current, proven processes and “better” practices

New practitioners are taught using latest knowledge

“Better” practices emerge as the workforce validates and renews the learnings and experiences

Search| Find| Share
Peer Assist
Action Reviews
Retrospect

© Working Knowledge®

Concept | Strategy | Practice
Knowledge at the Point of Execution®
KM Templates and KM Tools
KM Templates and Tools

• Peer Assist
• Action Review
• Retrospect
• Subject Matter Expert (SME) Knowledge Transfer
• Team Member/Leadership Targeted Knowledge Transfer
• CoP Checklist
### Example: Expert Knowledge Retention & Transfer Process Overview

<table>
<thead>
<tr>
<th>Step</th>
<th>Objective</th>
</tr>
</thead>
</table>
| **1. Identify Experts & Critical Knowledge To Retain** | • Identify experts and critical knowledge areas  
OR  
• Identify and prioritize knowledge areas for achieving future strategies and mission-critical operations, then identify corresponding experts  
THEN  
• Assess risks and other vulnerabilities  
• Prioritize knowledge retention opportunities |
| **2. Identify Successor(s) or other Learner(s)** | • Determine who will receive what knowledge  
• Understand learner(s)’ current capabilities |
| **3. Determine Knowledge Retention & Transfer Objectives** | • Define learner(s) expected capabilities and level of performance post-transfer (e.g., competent versus SME). |
| **4. Determine Knowledge Transfer Method(s)** | • Select methods for each knowledge item. |
| **5. Develop/Execute Knowledge Transfer Plan** | • Identify specific knowledge items to transfer with timeframe and measures of success or capability.  
• Implement knowledge retention plan. |
| **6. Monitor Expert And Learner Results** | • Manager tracks expert and learner progress against knowledge transfer objectives and plans.  
• Modify plans if needed.  
• Provide resources & reinforcement. |

© Working KnowledgeCSP

Source: Jeff Stemke, Stemke Consulting Group
A Few Takeaways

• KM doesn’t have to be complicated

• Knowledge Leadership is not a position

• Capture and retain relevant and critical individual and organizational learning on a continual basis as part of normal business operations

• Tie knowledge retention practices (capture and reuse) to succession planning and practices

• Leadership must be committed to investing time and resources to improve the ability of the organization to capture, adapt, transfer, and make knowledge (learned lessons) findable, accessible, and reusable

• Meet people where they are