IMPROVING THE RATE OF KNOWLEDGE TRANSFER

KMWorld

Session B303

Thursday, 5 Nov. 2015

APQC

Who's here today?

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APQC.

WHO WE ARE

APQC helps organizations work smarter, faster, and with greater confidence. It is the world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. APQC's unique structure as a member-based nonprofit makes it a differentiator in the marketplace. APQC partners with more than 500 members worldwide in all industries. With more than 40 years of experience, APQC remains the world's leader in transforming organizations.

We Research
APQC conducts research to discover and document world-class business practices.

We Share
We share proven methodologies and processes.

We Connect
We assist organizations around the world in adapting and using benchmarks and best practices.

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ABOUT APQC

LARGEST DATABASE OF BENCHMARKS IN THE WORLD

Access more than 8,500 benchmarking and best-practice studies

WE UNDERSTAND MEASUREMENT AND IMPROVEMENT

Compare your processes to other organizations around the world against more than 1,200 measures in 25 assessments
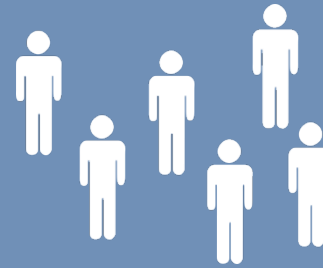
ROBUST NETWORK

Join a worldwide network of more than 15,000 professionals dedicated to process and performance improvement

BUILD INTERNAL COMPETENCIES

Incorporate the world's most widely used process framework, giving organizations a common language for functions, processes, and activities independent of structure
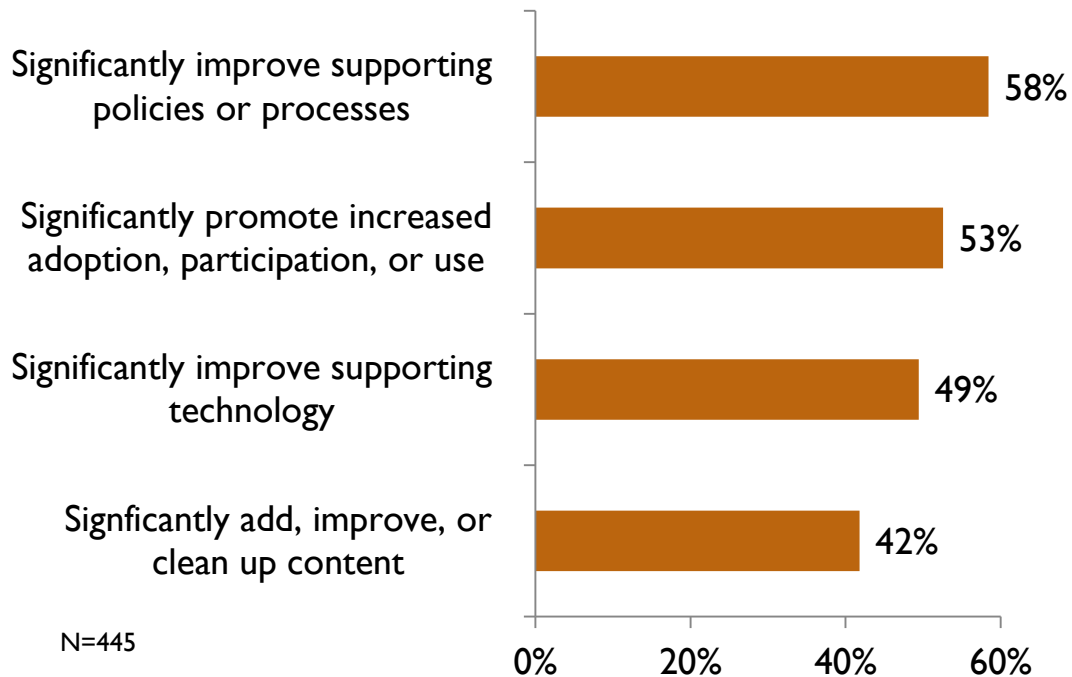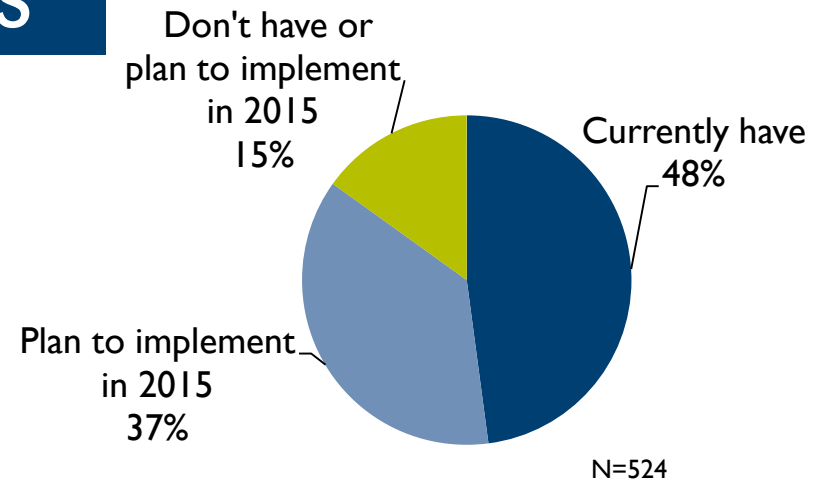
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o Sustained focus on knowledge transfer

o Known approaches to knowledge transfer

o Techniques to support knowledge transfer

o Additional resources

o Q&A

SUSTAINED FOCUS ON KNOWLEDGE TRANSFER

2015 KM PRIORITIES SURVEY RESULTS

Knowledge capture/transfer is among the **top 3** KM approaches to implement in 2015, with **37%** of survey participants saying their organizations plan to create new processes to capture and transfer critical knowledge over the coming year.
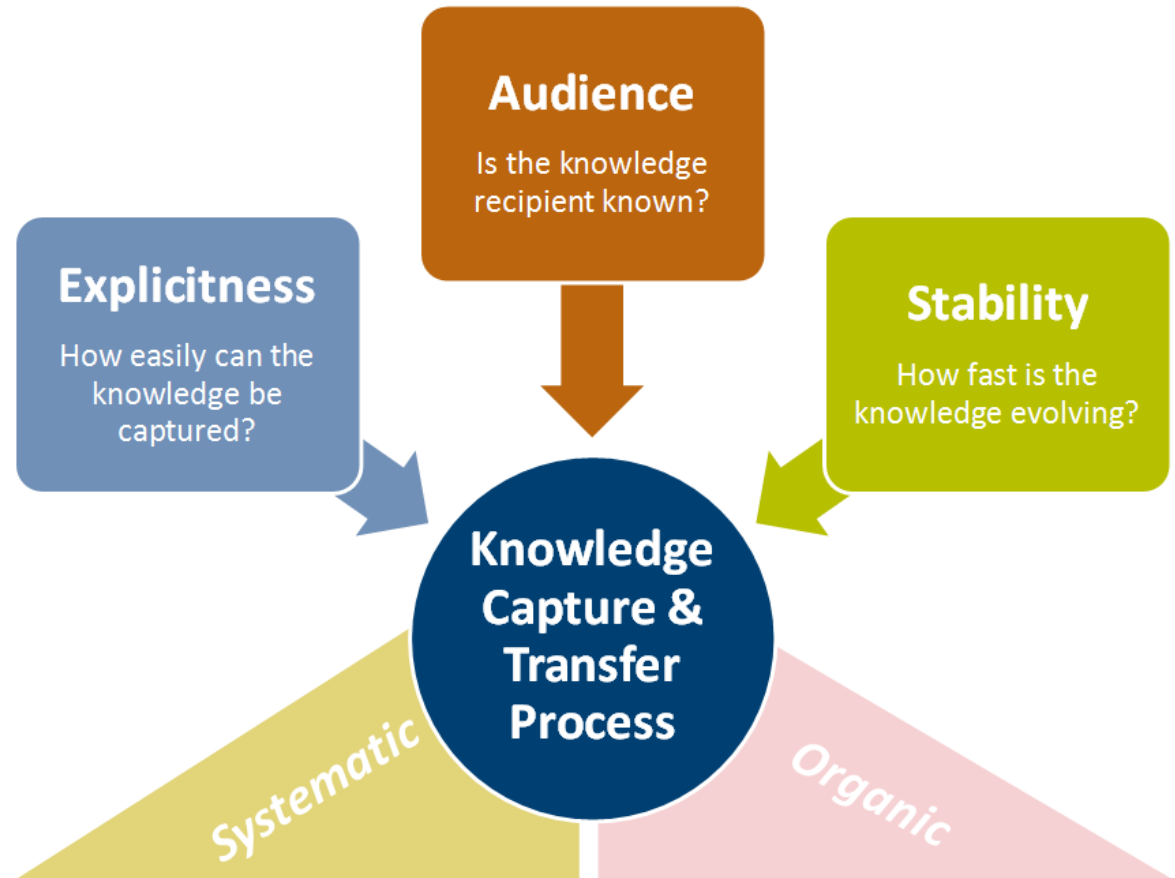
Don't have or plan to implement in 2015
15%

Currently have
48%

Plan to implement in 2015
37%

N=524

Significantly improve supporting policies or processes — 58%

Significantly promote increased adoption, participation, or use — 53%

Significantly improve supporting technology — 49%

Signficantly add, improve, or clean up content — 42%

N=445

0%   20%   40%   60%

Knowledge capture/transfer was also rated as the most common focus of participants' efforts to improve supporting **policies**, **processes**, and **technology** for KM.

Check out the full survey results in APQC's **2015 KM Priorities Data Report**

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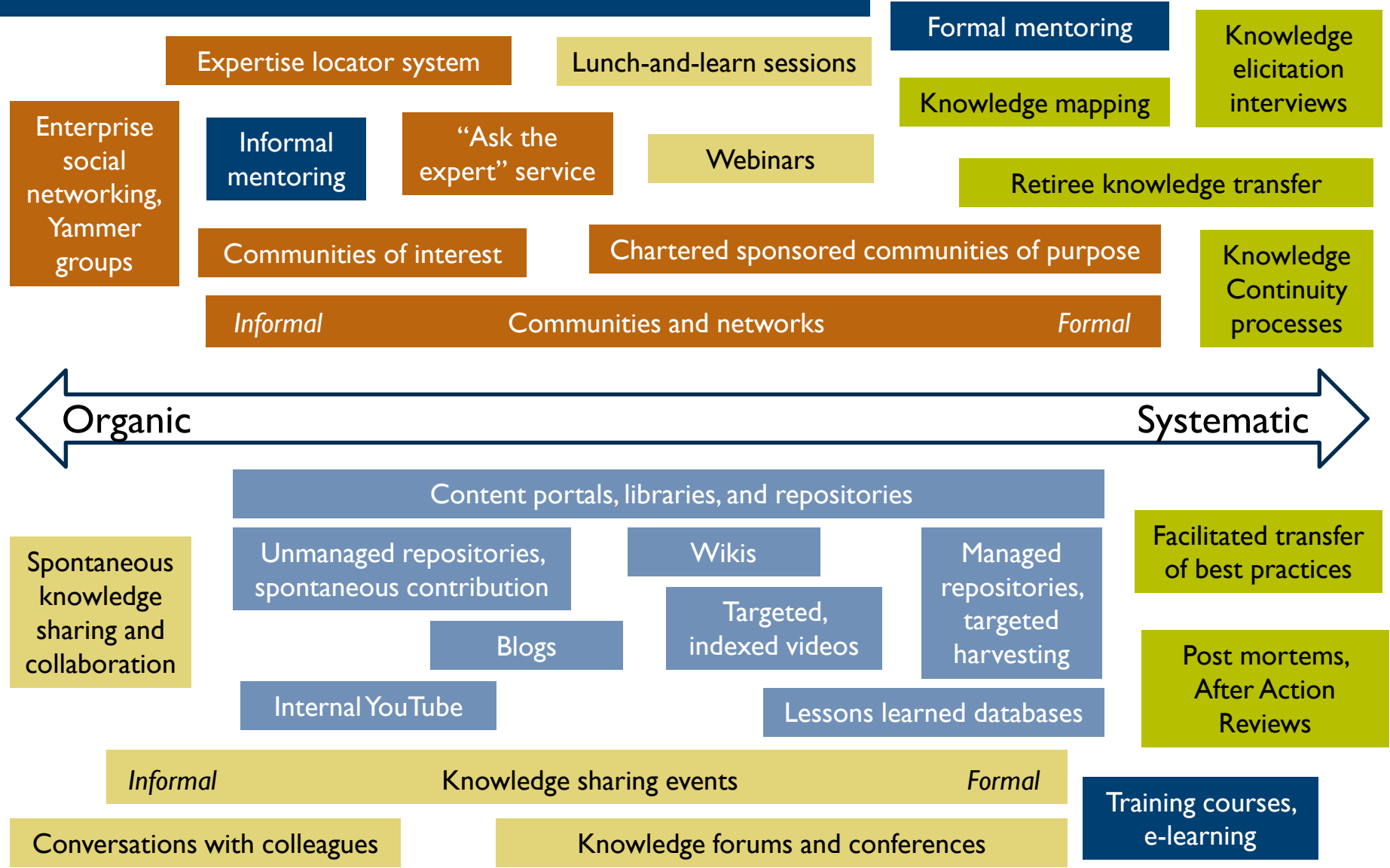*Make Best Practices Your Practices*℠

KNOWLEDGE TRANSFER APPROACHES

Knowledge transfer approaches can be placed on a continuum from *systematic* (formal, structured) to *organic* (informal, unstructured).

APQC's *Transferring and Applying Critical Knowledge* Best Practices Study identified three questions that organizations can ask to help identify the right type of knowledge capture/transfer approach to apply in a given situation.

Explicitness
How easily can the knowledge be captured?

Audience
Is the knowledge recipient known?

Stability
How fast is the knowledge evolving?

Knowledge Capture & Transfer Process

Systematic

Organic

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KNOWLEDGE TRANSFER APPROACHES

Formal mentoring

Knowledge elicitation interviews

Expertise locator system

Lunch-and-learn sessions

Knowledge mapping

Enterprise social networking, Yammer groups

Informal mentoring

"Ask the expert" service

Webinars

Retiree knowledge transfer

Communities of interest

Chartered sponsored communities of purpose

Knowledge Continuity processes

Informal   Communities and networks   *Formal*

Organic ← → Systematic

Content portals, libraries, and repositories

Spontaneous knowledge sharing and collaboration

Unmanaged repositories, spontaneous contribution

Wikis

Managed repositories, targeted harvesting

Facilitated transfer of best practices

Blogs

Targeted, indexed videos

Internal YouTube

Lessons learned databases

Post mortems, After Action Reviews

Informal   Knowledge sharing events   *Formal*

Conversations with colleagues

Knowledge forums and conferences

Training courses, e-learning

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KNOWLEDGE TRANSFER TECHNIQUES

SOME KNOWLEDGE TRANSFER (KT) CHALLENGES

Who
- Who needs the knowledge?
- What role do they perform? What do they do?

What
- What knowledge do they need?
- How complex is it?

When
- When do they need it (e.g., now, next week, in 60 days)?

How
- How should it be transferred?

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TECHNIQUES TO SUPPORT KNOWLEDGE TRANSFER

Swim Lane Name	Activity No.	Activity	What Knowledge Is Needed?	Who Needs This Knowledge?	Who Has This Knowledge?	Is It Tacit or Explicit?	What purposes & issues does it support?	Degree of Gap between Have & Need	C

Instructions | 1.0 Swim lane name | 2. Swim lane name | 3.0 Swim lane name | 4.0 Swim

APQC's Knowledge Map Template

Role: _____

Types of Knowledge Needed	How Quickly Is This Knowledge Needed?*		
	Immediate	Mid-term	Long-term
1. ….			
2. ….			
3. ….			
N….			

Role-Based Knowledge Matrix

Type of Knowledge Needed	Rate of Speed	Created By:	Identified By:	Collected By:	Reviewed By:	Shared With:	Accessed How:	Used By:
1. …								
2. …								
3. …								
N…								

Knowledge Flow Matrix

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1. Start with a Process Map:

Document the "as is" business process
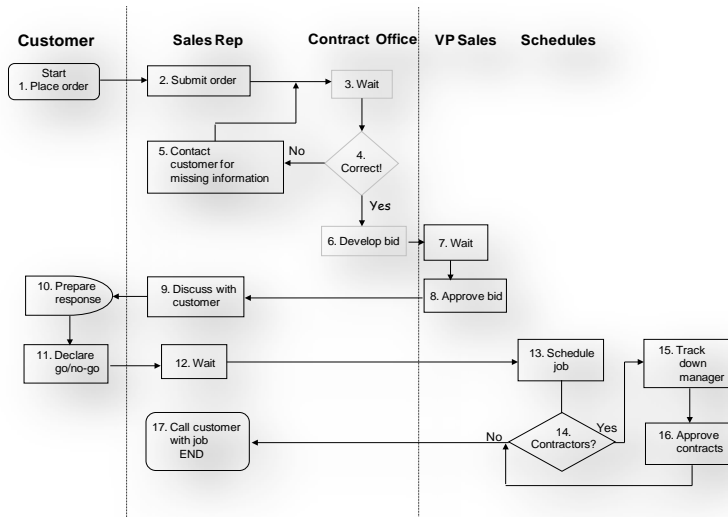
2. Follow with a Knowledge Map:

Chart the knowledge that is needed for each step of the process:

- What knowledge?
- Who has it?
- When is it needed?

EXAMPLE KNOWLEDGE MAP

Information of Interest

Process, Function, Operation, or Discipline

							Hire New Employee	
Process	**Activity**	**What knowledge is needed?**	**Who owns this knowledge? (sources or experts)**	**Tacit or Explicit?**	**Where is this knowledge? (repository, person)**	**Who can validate this knowledge?**	**Gap (1 = small, 3 = medium, 5 = large)**	**Additional Details**
1.0 Create and develop employee requisitions	1.1 Develop and open job requisition	HR policy guidelines; Hiring process; HR job posting form; Federal/state/union requirements; Budget for recruiting expenses	HR manager; F&A manager; Hiring manager	E	HR; F&A; Hiring dept; Dept of labor; Union chapters	HR	1	
	1.2 Develop a job description	Job duties; Skills set needed; Educational rqmts; Level of experience	Hiring manager	T	Hiring department	HR recruiting manager	5	
	1.3 Post requisition	Target audience; Posting duration; Posting methods (i.e.newspaper, job boards, internal career site)	Hiring manager HR recruiting manager	T / E	HR department; Hiring department	HR department	3	
2.0 Recruit candidates	2.1 Determine recruitment methods	Type of candidates; Salary range; Time to fill position; History of recruiting approaches and their effectiveness	HR recruiting manager	T / E	HR department	HR recruiting manager	3	Compensation can provide Comp Surveys on market pricing so HR understands reasonable salary grades for the position
	2.2 Perform recruiting activities / events	Upcoming forums (i.e. job fairs, open houses); Current market conditions	HR recruiting manager	T	HR department; SHRM; local HR associations; current employees; other HR practitioners	HR recruiting manager	3	
	2.3 Manage recruitment vendors	SLAs for vendor delivery times and expected quality levels	HR recruiting manager	T / E	HR	HR recruiting manager	5	SLAs have been created for newer vendors, however those who have been partners for longer than 2 years have not received SLAs

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ROLE-BASED: MATCHING THE PERSON TO THE KNOWLEDGE NEEDED (APQC)

Role: APQC Advisory Services Project Manager

Example for demonstration purposes only.

Types of Knowledge Needed	How Quickly Is This Knowledge Needed?*		
	Immediate	**Mid-term**	**Long-term**
Operational Knowledge	Contract terms	Latest per diem regulations	
Methodology Knowledge	Location of methodology toolkits	Newest processes and tools	
Customer Knowledge	Company demographics	History with APQC	
Staff Status Updates	Availability for new work	Vacation schedules	Development opportunities

*These criteria should be defined with the individual or group.

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UNDERSTANDING HOW THAT KNOWLEDGE FLOWS

- **Who**: Person (Role), Group, or Team
- **What**: Type of Knowledge Needed

Example for demonstration purposes only.

<Type of Knowledge Needed>	Rate of Speed	Created By:	Identified By:	Collected By:	Reviewed By:	Shared With:	Accessed How:	Used By:

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EXAMPLE: KNOWLEDGE FLOW – CUSTOMER KNOWLEDGE (APQC)

Example for demonstration purposes only.

- **Who**: APQC Pursuit Team
- **What**: Customer Knowledge

Pursuit Knowledge Needed	Rate of Speed	Created By:	Identified By:	Collected By:	Reviewed By:	Shared With:	Accessed How:	Used By:
Company Demographics	Immediate	External sources	External sources	CRM system	Account manager	Share w/ Pursuit Team	Link from CRM record	Pursuit team
		Client provided	Client provided	CRM system	Account manager	Share w/ Pursuit Team	Link from CRM record	Pursuit team
History w/ APQC	Mid-term	CRM system	Account and individual records	Customer intelligence profile	Account manager	Share w/ Pursuit Team	Link from CRM record	Pursuit team
Recent Business Performance	Immediate	External sources	External sources	CRM system	Account manager	Share w/ Pursuit Team	Link from CRM record	Pursuit team
Vision, Strategic Goals	Mid-term	Client provided	Client provided	CRM system	Account manager	Share w/ Pursuit Team	Link from CRM record	Pursuit team
APQC's Products / Services	Immediate	Internal - Advisory Services	Advisory Services SMEs	Vault (SharePoint)	Advisory Services Executive Director	Share w/ Pursuit Team	Link to Vault site	Pursuit team

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NEXT STEP: DETERMINE THE "HOW"

Immediate

- Yammer Groups
- Communities of Practice
- Videos
- Discussion Forums

Mid-Term

- Wiki
- SharePoint Library
- Webinars
- Lunch-n-Learns
- Search and Find

Long-Term

- Formal Training
- Conferences / Summits
- Knowledge Elicitation Interviews

How do we match the need with the appropriate transfer mechanism or approach?

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FUTURE RESEARCH & ADDITIONAL RESOURCES

CURRENT & UPCOMING RESEARCH

Current

What's Next for KM: 2015 and Beyond
- This project explores organizations' KM priorities for 2015 and what the KM trends and developments will be for the year and beyond.

Assessing Knowledge Management Maturity
- This project looks at how organizations leverage APQC's Levels of KM Maturity and KM Capability Assessment Tool as well as trends in the maturity data APQC has collected.

Technical Mentoring
- This study explores trends and best practices for mentoring in science, technology, engineering, and math (STEM) fields.

Upcoming

Revisiting Best Practices: Communities and Networks
- This study will revisit APQC's best practices on communities using new case examples and identify new or emerging practices in this area.

Knowledge Mapping in Action
- This study will refresh APQC's knowledge mapping tools and temples and provide case studies of knowledge mapping in action

Knowledge Sharing with Customers
- This study will explore how organizations share knowledge with customers, both B2B and B2C.

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ADDITIONAL RESOURCES

These additional resources can be found at
www2.apqc.org/kmworld2015

o   2015 Knowledge Management Priorities Data Report

o   APQC's Role-Based Matrix for Identifying Knowledge Needs: Description and Instructions

o   APQC's Role-Based Matrix for Identifying Knowledge Needs: Editable Template

o   APQC's Knowledge Flow Matrix: Description and Instructions

o   APQC's Knowledge Flow Matrix: Editable Template

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QUESTIONS

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FREEDOM to dream. COURAGE to act.

C. Jackson Grayson
Founder, APQC