



# **HR's Strategic Role in Knowledge Management**

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***May 4, 2016***

# Knowledge Management defined...

***"Systematic approaches to help information & knowledge emerge & flow to the right people at the right time to create value"***

**American Productivity & Quality Council (APQC) Working Definition**

***Capturing – Sorting – Communicating - Training – Protecting - Retaining***

# Typical Knowledge Management Mission Statement

**Promote a culture of continuous learning & innovation by enabling collaboration & leveraging talent to retain & grow a premier workforce.**

*Leveraging Talent is critical to moving forward on the path to premier*

## **Knowledge Retention Issues & Realities: Facing the “Brain Drain”**

- ✓ **Near-term retirement of near 77M baby boomers will result in significant losses of critical tacit knowledge, including loss tribal knowledge on key processes & competencies**
- ✓ **Big demographic shift in industry & government due to large generation retiring**
- ✓ **Difficulties pinpointing when and where in the organization critical knowledge losses will occur – both internal & external (vendors, partners, customers, etc.)**
- ✓ **Loss of customer confidence due to perception that organizations are out of touch or behind the times**
- ✓ **Steeper, longer learning curve for new people in the midst of high demand for faster revenue & higher productivity**
- ✓ **Generation gaps in how people work & collaborate with each other (i.e.: Millennial turnover every 1.3 yrs, Boomers staying)**
- ✓ **Reduced efficiencies**
- ✓ **Costly errors**

# Typical Symptoms - Where's The Pain?

- **Performance Failures**
  - Repeated errors – failure to apply lessons learned
  - Recurring cost and schedule slips
  - Partnership failures – internal & external
- **Dissatisfied Customers**
- **Dissatisfied Managers & Employees – leading to higher turnover, feeling undervalued, burnout, attitude & behavior challenges.**
- **Repetitive expense & burnout associated with continual interruptions of subject matter expert's (SME's) attention to addressing what should be "common" knowledge**

# Business Challenges

- **What will it cost to:**
  - **Replace a high-performing, experienced manager or individual contributor?**
  - **Let a subject matter expert (SME) leave without capturing the tacit knowledge and resources they developed over many years?**
  - **Fail to capture key knowledge and relationships from key individuals transitioning anywhere inside or outside the organization?**

Time?

Money?

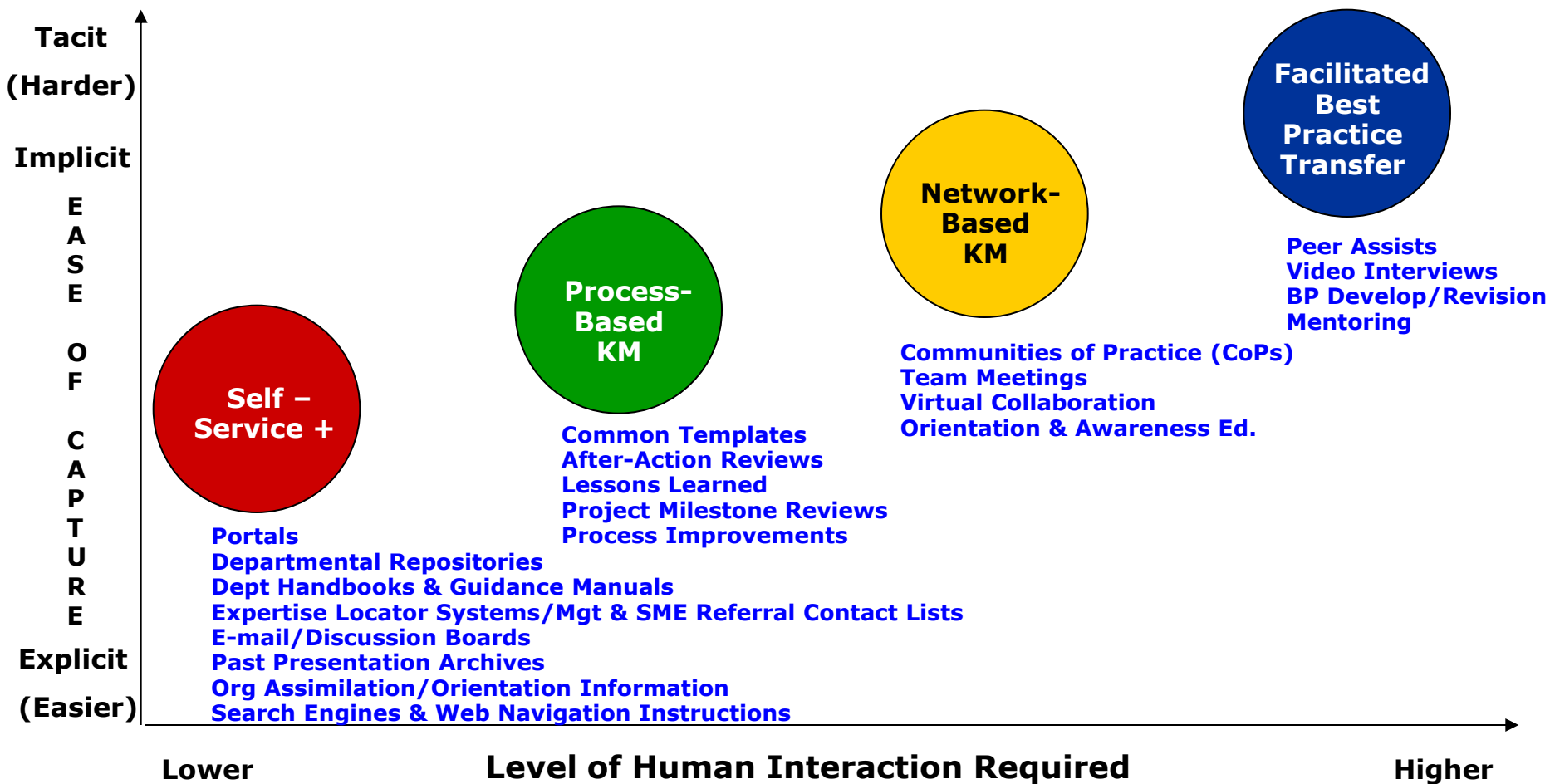
Reinvention of solutions?

Repeated mistakes?

Inconsistent service to customers?

***Can we afford the “CONK” (cost of not knowing) ?***

# Multiple Approaches to Knowledge Management





# Range of Knowledge

- **Explicit – formal / codified**
  - Books, documents, formulas, project reports, contracts, process diagrams, lessons learned lists, case studies, white papers, policy manuals, etc.
- **Implicit – middle ground**
  - Can be codified once value is established.
- **Tacit – informal / uncoded**
  - “Know-how”, past experiences & expertise found through interactions with employees, customers & vendors

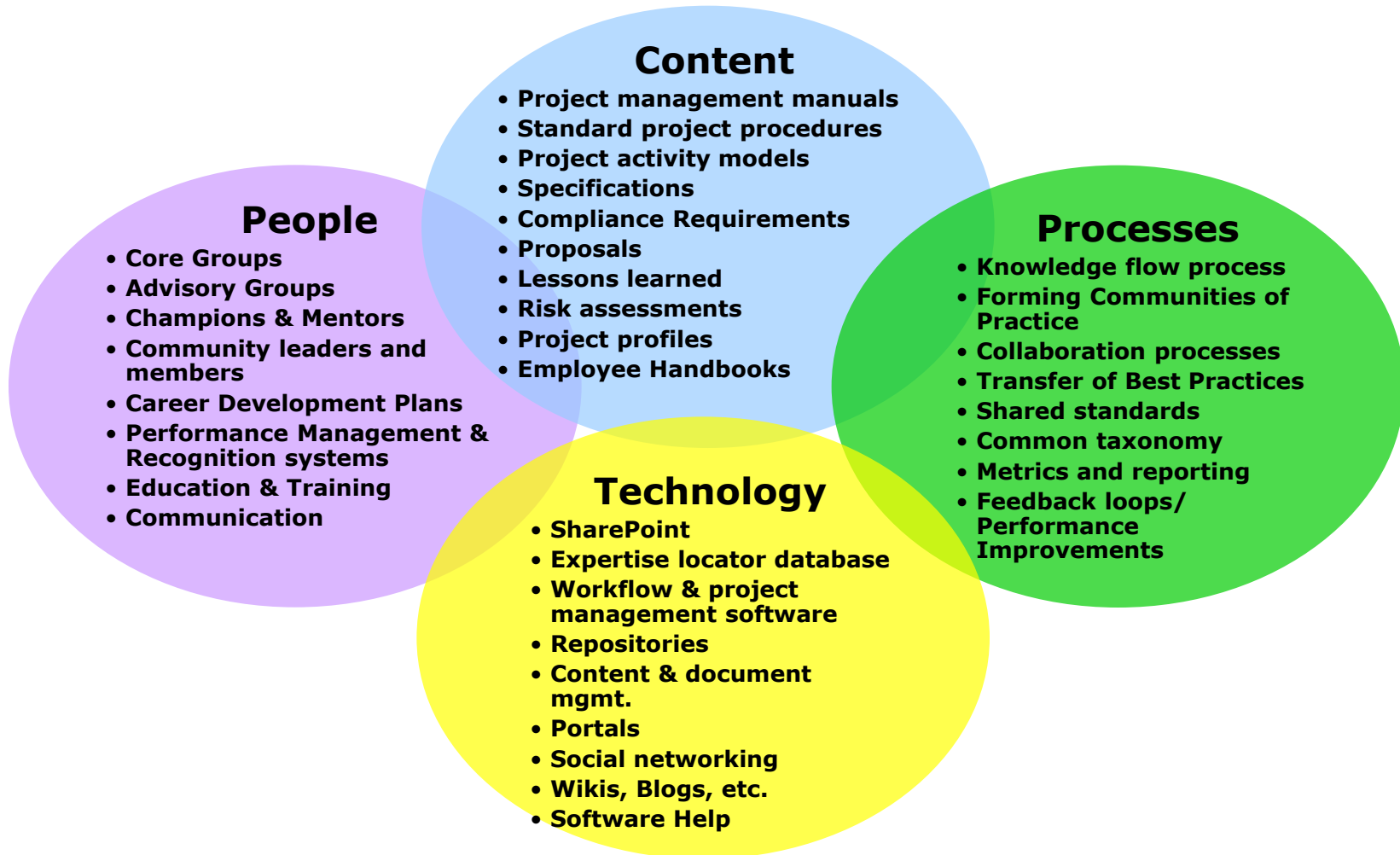


## *Quick Assessment*

**Make a quick list of what you currently have in place to capture & transfer knowledge that matters in each of the following categories:**

- 1. People**
- 2. Processes**
- 3. Technology**

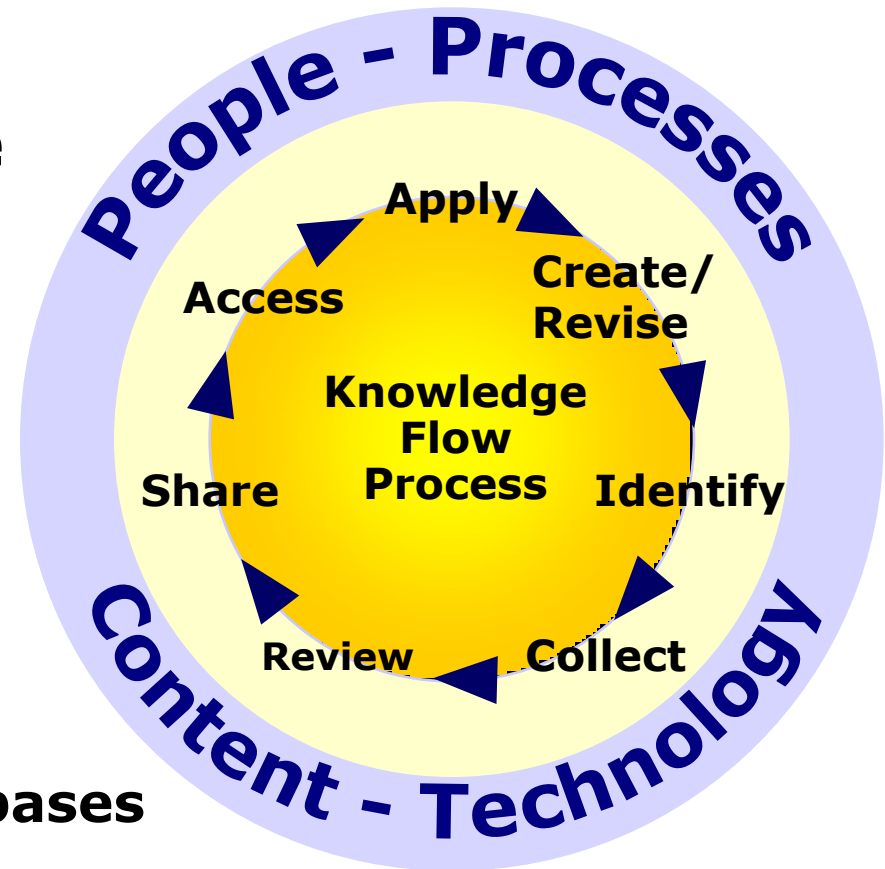
## 4 Major Elements to Consider in KM



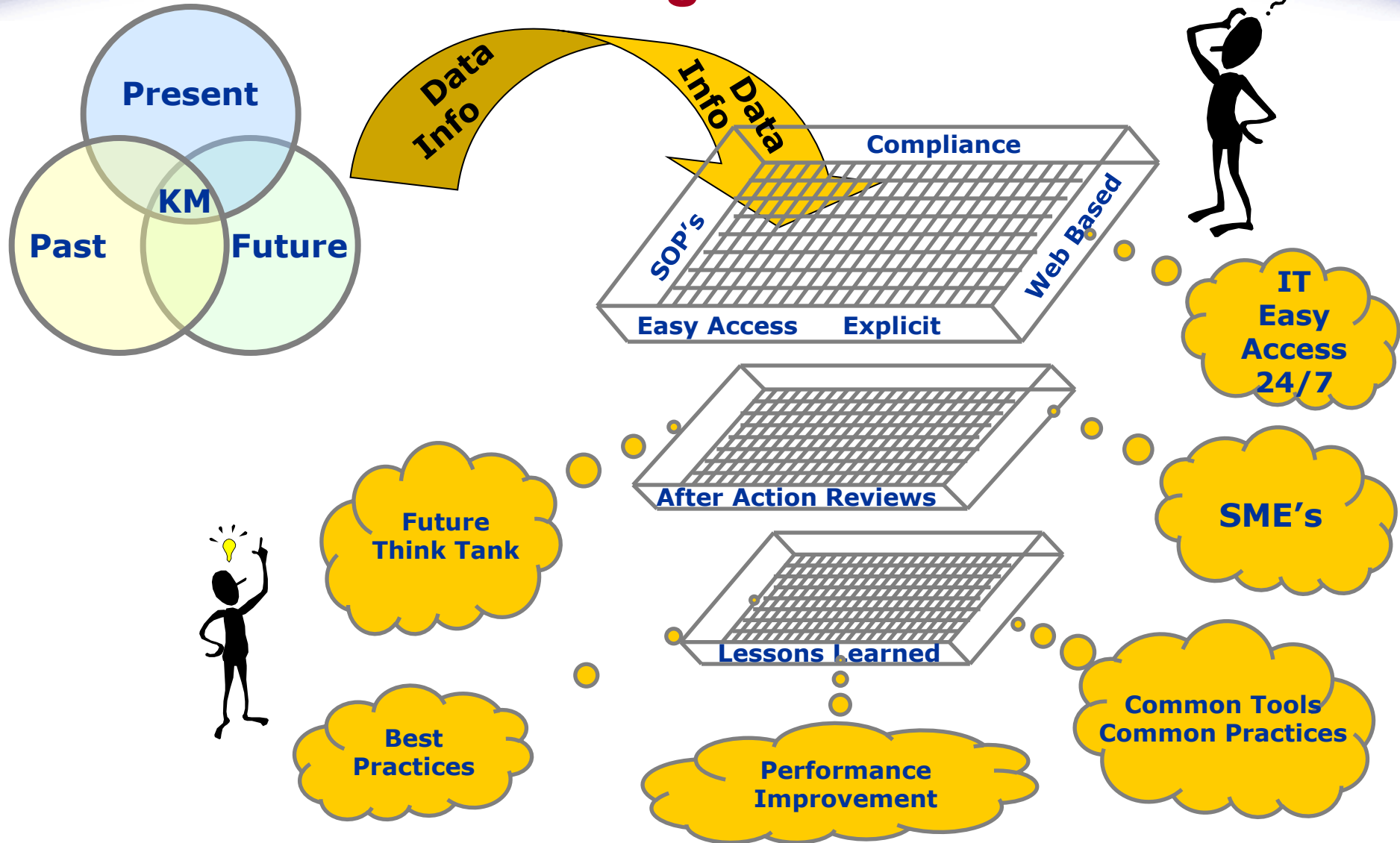
# Value is Created Through the Knowledge Flow Process

## Approaches to enable the Knowledge Flow include:

- Communities of Practice
- After Action Reviews
- Transfer of Lessons Learned
- Transfer of Best Practices
- Mentoring
- SharePoint/Searchable Databases



# Knowledge Transfer



**Knowledge transfer fosters learning & growth**

# HR's Strategic Role in KM

- **Review existing strategic goals.**
- **Identify & gauge the level of competency or expertise currently available to meet strategic goals of your organization. (Knowledge Mapping)**
  - **Talk with departmental management to help you determine if there are any talent gaps that could impact ability to successfully achieve goals.**
  - **Work with management to develop plans for addressing any gaps you identify.**
- **Observe & Ask Questions to understand the “people” issues involved when there are failures/set-backs in executing goals or when risks are identified. Work with management to develop action plans for addressing needs.**
- **Facilitate the usage of After Action Reviews & the capture of Lessons Learned.**
- **Keep the need for Knowledge Management visible & engage the rest of your leadership team in the process.**

# Areas to consider:

- **Competency Development**
  - **Identification of Current & Future Needs**
  - **Gap Analysis**
  - **Competency Development Planning**
- **Talent Development**
  - **Career Path Development**
    - » **Talent Database**
    - » **Progression Criteria**
    - » **Talent Assessments**
    - » **Employee Development & Mobility**
    - » **Cross-training/Rotational Assignments**
  - **Recent Hire Orientation/Assimilation**
  - **Educator & Professional Partnerships**
    - » **Subject Matter Expert Seminars**
  - **Career &/or Job-Relevant Mentoring**
- **Knowledge Management**

(knowledge capture-retention-retrieval-protection)

  - **Self-Service web-enabled reference material**
  - **After Action Reviews**
  - **Lessons Learned**
  - **Best Practices**
  - **Communities of Practice**
  - **Internal & External Benchmarking**
- **VOC Input/Feedback – internal & external stakeholders**
- **Change Management processes**
- **Benchmarking Trends – local & beyond**
- **Performance Goal Linkage & Evaluation**

# After Action Reviews – Lessons Learned

- What did we want/expect to happen?
- What actually happened?
- Why were there differences?
- What did we learn that we want to: adjust? avoid? repeat?



# After Action Review Meeting Process

## Prior to the meeting:

- Identify appropriate stakeholders.
- Distribute the ARR template and subject to be discussed (i.e. mishap, risk mitigation, cost / schedule / quality issue, conflict, etc.)

## During the meeting (4 AAR Questions):

- Establish the facts.
  1. What did we want/expect to happen?
  2. What actually happened?
- Analyze for each of the processes under review.
  3. Why were there differences?
  4. What did we learn that want to adjust? avoid? repeat?

## After the meeting:

- Organize the findings.
- Coordinate with SME to revise appropriate documents and ensure timely electronic posting / distribution.

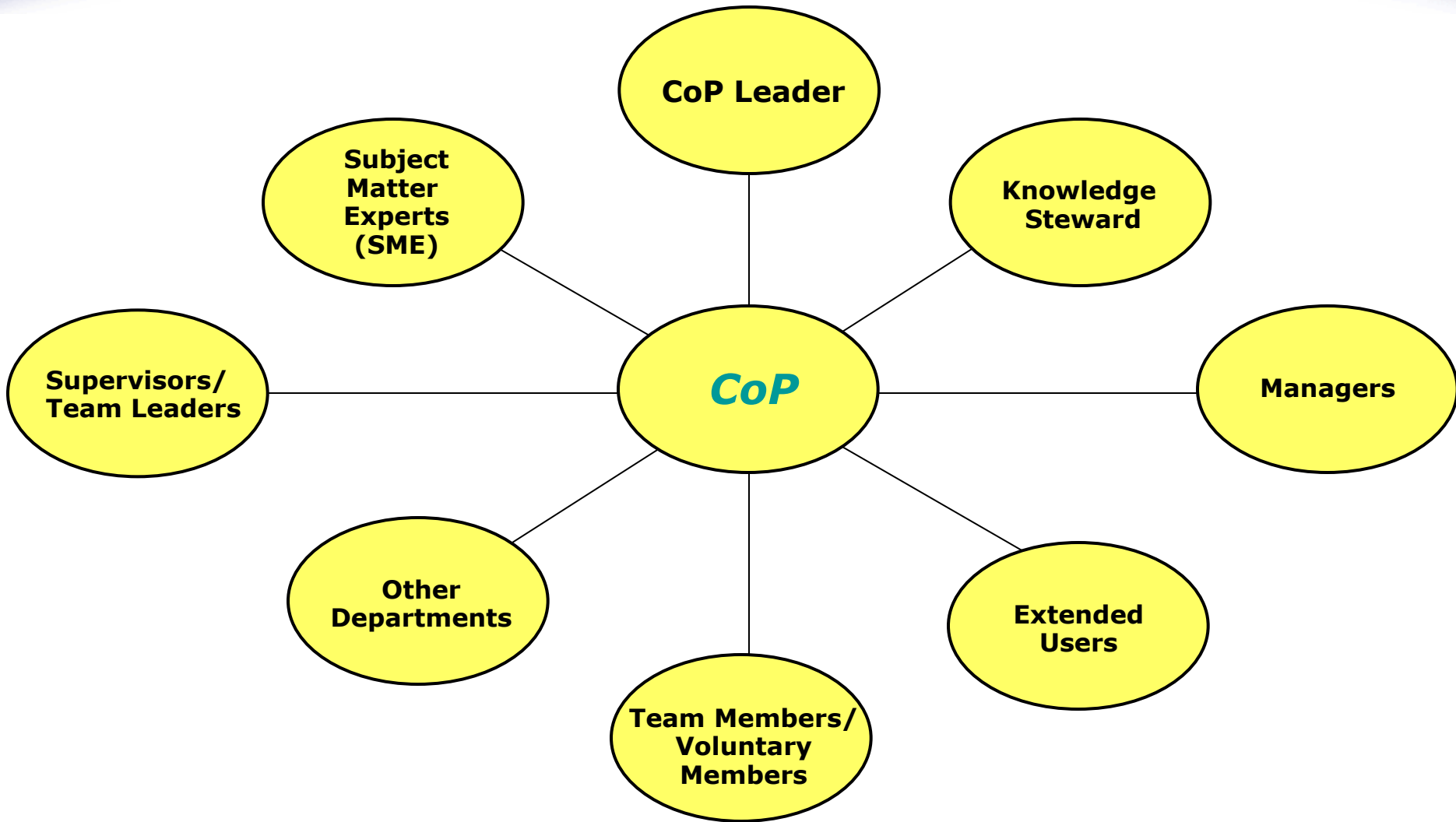
# Lessons Learned Reviews

- **Facilitated session held at end of an important phase or project.**
- **Structured agenda.**
- **Simple process – common template.**
- **All stakeholders invited.**
- **90% of attendees have learned something they can apply in the future (Rolls Royce benchmarking data over 2 decades).**

Lessons Learned Template					
What do we need to replicate or reuse in the future?	What do we need to adjust or avoid in the future?	SOP/SPI Document Revisions Recommended?	Best Practice Revision Recommended?	SME Review & Approval (List Name & Contact Info)	Other Reviewers & Approvals Required

# ***So...What is a “Community of Practice”?***

# CoP Model



***Crosses traditional organizational boundaries***

# Typical Community Functions

- **Contribute and prepare valuable knowledge content, including “tribal knowledge”, for others to access & use.**
- **Capture, review & publish relevant lessons learned & BP’s.**
- **Collaborate to create innovative solutions.**
- **Document relevant practices and procedures (i.e.: SOP’s, SPI’s, Guidance Manuals & Handbooks).**
- **Identify valuable industry benchmarking & reference sources.**
- **Create and maintain community web micro-site.**
- **Provide SME responses to FAQ’s & requests for assistance relevant to CoP area.**
- **Create targeted professional & leadership development roles.**

**Bind Together & Sustain Professional Practice Areas & Common Interests**

# CoP's & Career Path Development

- **Creates additional leadership opportunities.**
- **Encourages networking and career path exploration beyond current practice area.**
- **Builds systems thinking – provides bigger picture context.**
- **Expands transferable knowledge, skill and ability awareness.**
- **Links to internal promotion guidelines.**
- **Identifies opportunities for mentoring.**
- **Ties to performance goals & evaluation.**

# **KM Best Practices – Common Themes**

- **Active Communities of Practice**
- **Expert Locator Systems**
- **Simple web-based lessons learned databases**
- **After Action Reviews & Lessons Learned – critical to successful KR&T**
- **Knowledge Stewards - key role in managing documentation**
- **Resource constraints - challenge to speed & quality of implementation**
- **Pace KM implementation conservatively – use pilots and allow time to adjust/adapt lessons learned to increase success...culture change required (avg. 5-7 years)**
- **Face-to-face interviews - best approach to gathering tacit knowledge**



## **Additional Resources**

**APQC (American Productivity & Quality Council), [apqc.org](http://apqc.org), 123 N. Post Oak Lane, Houston, TX 77024.**

**“Communities of Practice & Associations: How to Build and Sustain Effective Communities in Your Associations, APQC Publications, Houston, TX 2006.**

**“Knowledge Mapping: The Essentials for Success” by Wesley Vestal, APQC Publications, Houston, TX, 2005.**

**“Knowledge Management for Teams & Projects” by Nick Milton, Chandos Publishing, Oxford, UK, 2005.**

**KM World Magazine, [kmworld.com](http://kmworld.com).**

***Thank You for Attending Today!***



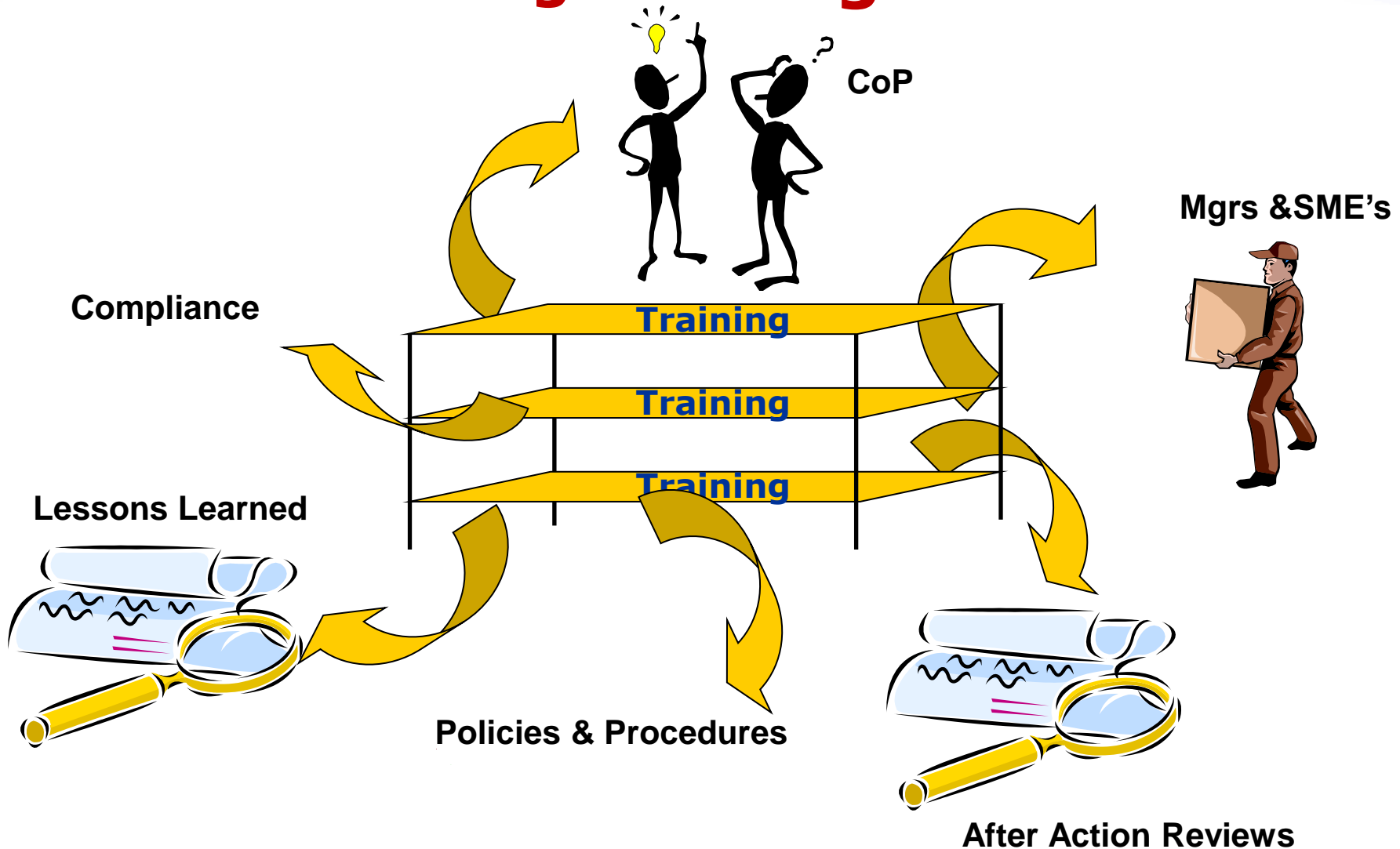
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# Knowledge Management



**Building the foundation for success**

# Knowledge Mapping

## 3 Major Categories:

- **Enterprise Knowledge**
  - Strategic Overview
  - Enterprise Overview
- **Cross-functional**
  - Expertise Tacit Knowledge
  - Technical/Functional Knowledge
- **Process Explicit**
  - Document Explicit Knowledge
  - Job & Role-based Knowledge
  - Competency/Learning Needs