



DoD Knowledge Management Conference
Knowledge Management Buzz Session:
Using KM for Results in Your Organization
October 15, 2009, Ronald Reagan Building, Washington, DC

Buzz Summary

The final Session of the DoD KM Conference was a "Buzz Session" where attendees were presented two separate topics and then discussed the topic between participants at their table, based on talking points below. Each table had a Facilitator to lead the discussion. These notes are highlights based on input from attendees who participated in the session. Table numbers below do not accurately reflect the actual table numbers from the session.

Buzz Session 1: 24K Gold: Capturing and Transferring Critical At-Risk Knowledge

- Presented by Jane Maliszewski, Principal, ISKA--Information Strategies for the Knowledge Age

Session Description:

Organizations are increasingly under pressure to provide effective and accountable performance, yet the challenges to maintaining their 'edge' and expertise seem to be growing at an ever quickening pace—BRAC relocations, retiring senior workers, bringing on new employees, mission changes, downsizing, out sourcing, in-sourcing. Knowledge retention and transfer is, understandably, a big concern. But all knowledge is not 24K quality. Some is like fool's gold and not worth keeping...as those of you that have massive share drives can attest to. What are some effective ways to identify and retain critical knowledge and make sure it is transferred to those who need it?

Buzz Discussion Issues / Talking Points:

- What would you consider to be the gold nuggets--critical at-risk knowledge--in your organization? What do you think is the most effective way to capture and share this?
 - What kind of knowledge retention and transfer programs does your organization currently use? (What happens when someone retires or leaves for a new job? How do you improve time-to-competency for new employees? How do you keep track of major decisions?)
 - What works and what's not worth it?
 - Does rapid change make the whole effort to capture and transfer critical knowledge irrelevant?
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NOTES:

Table # 1 Participants

Transfer Programs:

- Interview Questions
- Captured Video
- Distilled into nuggets
- Onboarding Process
- Roundtable
- Team discussion

- Understanding Processes
- Who to go to
- List job steps: What are the pitfalls and work arounds?
- Documentation put on share drive people not wanting to engage
- Even though the information is there it may not be used
 - Discoverability
 - Not in a format that is useful
- People are rewarded for creating "new" information and new ways
- Ease of access to the information
- Cross training if possible

Table # 2 Participants

1. Also consider the process of how "gold nuggets" are identified
 - Gold nuggets are who is doing what and who knows what
 - One effective practice is to create a wiki -- along with individual wikis
 - From one organization: We don't know yet what we know. So we are doing a knowledge audit / discovery process to know what we have
 - It's not so much your gold nuggets rather who are your gold miners. Identify single points of failure if one person left. Concentrate on capturing their knowledge first.
2. For people with critical knowledge, move other people near them -- they will pick up a lot through osmosis
 - Waiting until they retire is too late. This has to be an ongoing process
 - Part of evaluation is maintaining a continuity book
 - Cross train people and routinely flip flop people
 - There are not very many onboarding programs out there for new employees
 - One organization does a one week onboarding. They run it every other month. Leadership across organization presents at these sessions.

Table # 3 Participants

One person only that does a job -- at risk: Should ID those:

- Maintain a continuity book
- New person / old spending time together
- Allowed to keep present boss if incoming boss
- Verbal exchange effective; 90 day overlap

Use organization email instead of personal email

- Information sharing
- Treat emails like network
 - cultural barriers to sharing
 - "I'm not the only one that should have to answer"

Examine missions -- ID critical processes

- ID critical experts
 - Use job shadowing, succession planning
 - mentoring

ID most critical applications

- Email is most critical
- Operations manuals: keep them up to date

Should use blogs instead of emails

- Blogs are easier to organize than email

One agency has electronic transfer form for retention

Sharing environment: post things to a general area

- Sharing Lessons learned
- Keys to success -- brief the benefits; change management

Bottom-up and Top/Down approaches both work

- Need both approaches, but can start w/ either one

Table # 4 Participants

- Using share drive to ensure all employees have access to project information
- Interviewing, transition meetings notes: project files, use of DVDs and CDs to transfer such knowledge
- Narrative description; use I-Share Site
- Address CoPs with HD access capabilities to all employees
 - Lessons Learned Programs
 - Mentoring programs
 - Suggestion of key types of work
 - Co-work with outgoing employee
 - Lean Six Sigma initiative helps improve the KM process

Table # 5 Participants

- Brac: identifying talent and helping with placement if they aren't moving.
- Take this effort the extra step to capture knowledge and identify talent.
- This could be done as needed
- Structured interviews and connect with replacement. Identifying the WIIFM
- Nugget: need to be doing more milestone interviews
- Teaming: person leaving with someone staying to support transition
- Knowledge sharing -- performance evaluation
- Top down leadership to set the tone for sharing knowledge
- Anyone can recognize fellow workers such as passing around a trophy

Table # 6 Participants

Gold Nuggets:

- Metaphor for Library within one agency: Coal Mine
- Participant came on board after a 25 year veteran retired with a 6 month lapse in coverage. Presents a very difficult situation.

Agency "A" Experience

- Capturing processes for new team members
- "Turnover Books" -- and standard template for content
- My Site: SharePoint
- Lessons Learned Lifecycle

Agency "B" Experience: Library

- Start-up with no corporate memory
- Highly visible directorate
- Weekly status report has become a journal
- Ongoing command history
- Daily status report wiki became a permanent status report

Wiki

- Get the chief or knowledge manager to encourage "enforce" updates Red, Yellow, Green

Option of audio/video

- Suggest explanation of context
- tired of meetings

Issues:

- Searchability issues when multiple data storage locations exist

Table # 7 Participants

Transferring what is important; Insights gained:

- In one agency, records management roles is a place to start to know what info to keep. Workforce knows what knowledge is needed better than senior management. What they need to know.
 - Surveys
 - Interviews
- It makes sense to have a transition period; to have a person exiting work side-by-side with entering person
- Marry info needed with info location
- Leverage collective wisdom of communities
- Add a quality voting to known knowledge to learn what knowledge is of value
- Look for what info is asked for the most as a way of learning what knowledge is important to the org

Table # 8 Participants

Knowledge Retention:

- File storage -- should include roles/responsibilities/role-driven documentation
- Tagging information on profile (kind of Linked-In) can be helpful to show expertise available
- Tagging is good but can overload (example given of 8,000 tags on one KM website)
- A lot of KM under the covers

- Hard to capture implicit / tacit knowledge
 - Consider involving the replacement employee in the interview process
 - smart book -- decode if your job description / network is not explicit
 - Issues with video taping:
 - expensive to transcribe
 - 508 compliance issues
 - lots of editing and expertise skills needed
 - power in the interview
 - you have to know enough to ask the right questions; required skill set, institutional knowledge
- Knowledge Asset Management Problem: biggest asset is currently unmanaged knowledge
- For KR, do a peer explicit knowledge seminar or knowledge cafe
- Big concern about information that contractors hold
 - Contractors often hold unique knowledge gained through government funding that government employees do not have
 - Contracting officers should make knowledge delivery a contract deliverable

Table # 9 Participants

- Knowledge retention & transfer: needs to be a priority for org
- Incumbent / critical knowledge / infrequent / rapid response / key relationship / go to people
- On boarding
- Mentor; teaming / shadowing / CoP
- Core Processes / Active
- Skill Sets
- Short term mining: KMAPs / Interview / Written/Audio / Round Tables
- Long Term Mining: CoP / Tech Monitoring / Scenario based roles / Codify / Guided Exp. & assignments / Decision support / learning sys.

#1 Networking & Process

- Knowledge Audit: in your first year what did you wish you knew?
- Skill based -- need assessment, adding wiki, always have 2
- One agency not doing anything / use list-serve [push] -- has CoP but some died
- Policy: how should I pass on
- Lose "K", use SharePoint instead of email; does process mapping; network specific; desktop guides -- for skills

#4: KM more important with rapid change / technology is not only way to manage change

Table # 10 Participants

- Write EXSUMS (Executive Summaries) and use Battle Books to capture knowledge
- Everybody has to have a 2nd Person they share information with in one organization
- 1 person is responsible for putting all decision memos on a Community of Practice or Shared Drive
- Determine the 10 critical people in the organization and focus on capturing their knowledge
- Exit Interviews don't work
- Use Continuity Books to capture knowledge
- Use Discussion Forums to capture knowledge
- Use CoPs like the Army's KMNet to capture knowledge
- Use a Wiki and put in video snippets of key personnel

Table # 11 Participants

Agency "A" Experience

- Person leaving had institutional knowledge "in his head"
- Another person had communications tower knowledge (infrequent but high value knowledge) a mental framework of regulation was written in rules and regulations but the retiree had 'instant recall' of these
- Need to: capture before people leave to train peers - both the infrequent but high value plus every day problems
- One solution has been to call people up on leave
- Create Knowledge-sharing culture now; share and codify, make searchable
- CoPs must be in place
- Keep training programs credentialed and running
- Still shared drive environments

Agency "B" Experience

- No \$\$, looking into wikis, more stick than carrot approach
- Need to keep training programs credentialed and running, including leadership training
- Knowledge = contacts, SoPs, credentials needed to keep training moving forward
- Don't discriminate between golden and "buffalo" nuggets
- Looking into SharePoint, search engines, word discriminators

Agency "C" Experience

- "Fast Learning" used with student programs - "learning before" (Peer Assist) whereby capture expectations of new students and connect them with prior year students to share their knowledge about being an effective intern.
- Also "learning after" (Retrospect) to learn after each program. All of this is used to continuously improve the programs. Anecdotal metrics are blended with quantitative metrics.

Agency "D" Experience

- Knowledge retention efforts begin w/ process maps, understand what is working and not working to improve processes

Table # 12 Participants

- Use videotaping to capture information
- Form a library, on-demand, open to all
- Have technical librarian who oversees blog in SharePoint
- Similar to a virtual rolodex -- divided by categories, open to all
- Work with those leaving -- using surveys to capture information
- Approach is valuable legacy
- Have an Oversight Committee, meet regularly to share what each group is doing through the organization
- Implement from bottom up -- have full support of top management
- Add capture and transfer as part of individual performance plans
- Provide guidance; uses monitoring, partnering, dog and pony shows to share
- Nothing in place as formal policy to capture info when people leave
- Have CoP sites
- Have discussion boards
- Beginning to start a transition program; meanwhile, call people who leave if there are questions
- Hard to capture info as people are reluctant to share

Table # 13 Participants

- Knowledge resides within core processes
 - Document processes
 - Observe processes
 - Run simulations
- Employees Serving Two Year Rotations
 - A shared orientation process begins on first day
 - Employees are taught that the Share Point repository is the key component of the Knowledge Management Program
 - The exit interview at the end of the 2 years evaluates the effectiveness of the tool and the effectiveness of knowledge capture processes.
 - Key questions:
 - What knowledge did need to have access to but didn't?
 - How can we improve SharePoint repository?
- A Government Technology Agency has aging equipment and aging technology experts
 - Solution place older technology experts with new technology hires
 - The new hires are dependant on the operations manual as they acclimate to their jobs.
 - The mentor and mentee build trust based on common frame of reference -- the operations manual.
 - Primary interactions are based on how the day to day processes differ from operations manual.
 - This interaction facilitates the transfer of tacit knowledge
 - Metrics show that this KM program has improved safety and operational effectiveness.
- Knowledge seeker, Knowledge source KM Program
 - Knowledge Source must be able to condense his/her role into a 10 minute story.
 - Knowledge Seeker asks questions to obtain tacit knowledge after hearing the story.
 - The Knowledge Source improves their story and documentations improvements as explicit knowledge in a repository.

- Crimes are solved by viral networks based on tacit knowledge of agency and external sources.
 - This process led to a knowledge loss.
 - KM program is being developed to replicate the acquisition of tacit and turn it into explicit knowledge to solve crimes
- KM Program has a rating system tied to expertise.
 - Employees are able to self-nominate for expertise.
 - The KM team facilitates pre-screening of experts.
 - If their expertise falls short it hurts overall performance rating.
 - Confirmed expertise is rewarded
- A government agency has 40% its staff eligible to retire in 2010.
 - Managers given critical task assessment tool to help address this possible knowledge loss
 - Employees are provided with a task reference guide with templates to document their roles and duties
 - The Exit interview process provides feedback on tools used by managers and employees leading up to retirement
- KM Program designed to addresses Advanced Procedures in the Military
 - Instructors share knowledge by first doing a peer review of knowledge area.
 - They judged on a qualitative basis on their ability to convey knowledge and quantitatively based on knowledge competency.
 - The role of instructor is earned, many potential instructors are rejected
 - Students provide feedback captured to improve the knowledge areas.
 - The program has shown that much of the knowledge is adapted by the students.
 - Associated metrics show positive results.
 - There is still some unlearning "knowledge loss" as they return to their bases and they must adhere to processes in place there.
- KM Metrics:
 - No one wants metrics.
 - No one is good at them.
 - No closure is ever achieved on metrics to utilized
 - Can we tie measures with impact?

Table # 14 Participants

Topics discussed:

- One participant reports that his overall organization is not good / prepared at capturing knowledge and keeping it in-house; however there are pockets in the organization where knowledge transfer works well on lower levels based on personal initiatives mostly triggered by befriended staff members
- One participant reports that two centers are merged and one location is relocating to another state; as a result it is expected that 70% of the current staff will not move;
 - General advice / agreement: Do not wait to the last minute – start early!
 - One participant reports that they have a specific program for retirees which they are required to start 3 month before the retirement date. As part of that program the knowledge is conserved and the retirees receive some help with their CVs; → help with the CVs as an incentive to actively participate in program; triggered a lively discussion on the need of incentives to motivate staff to share their knowledge;
 - General problem identified: Retirees are often not motivated because they have had issues with the organization which is the reason for them leaving
- One participant reports that in her organization everyone has to think about the scenario "What if I get hit by a bus?", based on that exercise issues are identified. Issues discussed related to this approach:
 - People are afraid of being micro managed when their tasks discussed and captured
 - Maybe such a discussion should be part of the annual performance appraisals (→ is this frequent enough? Do we get the needed details?)
 - General agreement: KM transfer activities need to be planned and executed all year long; on a regular basis (e.g., using SOPs) - not only for specific occasions such as the retirement of some staff since most problems occur unplanned (e.g., because of illness, training absence, change of job/position of staff etc)

General agreements / advice:

- Create a systemic knowledge risk program
- Have specific routines and procedures executed frequently
- It is usually too weak to do a 1on1 person transfer

- Provide incentives to staff for sharing their knowledge