Getting Started with Knowledge Management
Technical Instructions

Webinar General Information
- Duration: Approx. 1 Hour
- Have your email on hand which includes the log-in and call-in info should you be disconnected

How to Submit Questions:
- If you would like to ask a question at anytime please utilize the Question box on the right side of your control panel
- You can also minimize your toolbar by clicking on the arrow icon

Having Trouble?
- Screen: Close all windows and restart
- Phone: Hang up and call back
Today’s Presenters

Jean Roque
Founder and President of Trupp HR, a human resources company that provides HR consulting services, HR outsourcing, recruiting, training and development solutions for small to mid-sized organizations. Trupp HR was recently ranked in Oregon’s 100 Fastest Growing Private Companies.

Kristen Gallagher
Founder of Edify Education Design, a consultancy that designs and builds learning experiences that people actually learn from and like. She brings over eight years of instructional design and alternative learning environment experience to Edify.
Welcome!

Let’s get to know each other a little bit.

Please share your name, industry, and one thing you’re hoping to get from this webinar in the chat box.
So who am I?

The voice in your head you’re listening to is coming from Kristen Gallagher.

Kristen founded Edify Education Design to help companies become amazing places to work through employee development and knowledge management.
Today’s Agenda

- What is KM?
- Connecting to Org Dev
- Building a KM Philosophy
- Prioritizing & Best Practices
How is KM like the ocean?
What is KM?

A systematic approach to finding, understanding and using knowledge to achieve organizational objectives.
What is KM?

<table>
<thead>
<tr>
<th>Structures of Knowledge Management Include...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data</td>
</tr>
<tr>
<td>Information</td>
</tr>
<tr>
<td>Knowledge</td>
</tr>
</tbody>
</table>
## What is KM?

<table>
<thead>
<tr>
<th>Identifying &amp; Collecting Knowledge</th>
<th>Storing Knowledge</th>
<th>Transferring Knowledge</th>
</tr>
</thead>
</table>


What is KM?

<table>
<thead>
<tr>
<th>For My Role?</th>
<th>For My Team?</th>
<th>For My Business?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask: How do I capture and use key information in my daily work?</td>
<td>Ask: How does my team create and use information in their work?</td>
<td>Ask: What information does my business create?</td>
</tr>
<tr>
<td>Ask: What are the implications of &quot;having&quot; this knowledge?</td>
<td>Ask: What information does my team need to be successful?</td>
<td>Ask: What information does my business need to operate - and who owns it?</td>
</tr>
</tbody>
</table>
Connecting to Org Dev

Why do we need to work on knowledge management?
Connecting to Org Dev

- Bringing New Employees On Board
- Team Communication
- Succession Planning
- Helping Employees Be Successful
- Intellectual Property
- New Markets
Connecting to Org Dev

How Does Knowledge Management Work?

- Explicit Knowledge Transfer Practices
- Implicit & Tacit KT Practices
- Knowledge Recovery Initiatives
- Data Collection & Storage
- HR Processes & Practices
## Connecting to Org Dev

| Explicit Knowledge Transfer Practices | Knowledge Maps & Inventories  
|                                      | Documenting Processes  
|                                      | Training  
|                                      | Expert Interviews  
|                                      | Games  
| Implicit & Tacit KT Practices        | Mentoring/Coaching  
|                                      | Communities of Practice  
|                                      | Job Sharing  
|                                      | After Action Reviews  
| Knowledge Recovery Initiatives        | Knowledge Audit  
|                                      | Exit Interviews  
|                                      | Succession Planning  
| Data Collection & Storage            | Document Repositories and Management Systems Databases  
| HR Processes & Practices             | Skill Base Analysis  
|                                      | Archetypical Job Growth Plans  
|                                      | Retention Policies  
|                                      | Retention Culture  
|                                      | Knowledge Sharing Culture  

Building a KM Philosophy

Building a company knowledge management philosophy means understanding and planning for three key factors:

<table>
<thead>
<tr>
<th>Company Values</th>
<th>Business Metrics</th>
<th>KM Goals</th>
</tr>
</thead>
</table>
A Deeper Look: KM Dynamics

How does Km actually work in a business?

- **Individually**
  Each person is accountable for managing their knowledge creation.

- **In Teams**
  Teams are accountable for documenting and sharing knowledge.

- **In the Business**
  Executives and Managers collect and oversee knowledge from all business areas (regularly).
### Building a KM Philosophy

<table>
<thead>
<tr>
<th></th>
<th>Company Values</th>
<th>Business Metrics</th>
<th>KM Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Individual</strong></td>
<td>How do the company values actually &quot;play out&quot; on the employee level?</td>
<td>How is the employee’s performance measured?</td>
<td>How does the knowledge generated-obtained by the employee add to the business?</td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td>How does the team adhere to and exemplify the values in its work?</td>
<td>How is the team’s success measured?</td>
<td>What are the expectations for the team in terms of capturing knowledge?</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td>How does the culture show commitment to the values?</td>
<td>How does the workforce collectively move the business forward?</td>
<td>What is the business’ end game for capturing and using knowledge?</td>
</tr>
</tbody>
</table>
Building a KM Philosophy

For example, a company may create the following philosophy:

“We at Edify value integrity, open-mindedness, and innovation. Therefore, we will:

1. Capture data from all team meetings and use it to find new insights,
2. Enact archetypical job growth plans for all employees,
3. Begin succession planning as soon as someone is hired, and
4. Invite anyone on the team to use the knowledge database to produce new ideas.”
Start prioritizing efforts by using the KM Framework:

- Explicit Knowledge Transfer Practices
- Implicit & Tacit KT Practices
- Knowledge Recovery Initiatives
- Data Collection & Storage
- HR Processes & Practices
Prioritizing & Best Practices

What needs to happen first? What is an easy win?

<table>
<thead>
<tr>
<th>Explicit Knowledge Transfer Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implicit &amp; Tacit KT Practices</td>
</tr>
<tr>
<td>Knowledge Recovery Initiatives</td>
</tr>
<tr>
<td>Data Collection &amp; Storage</td>
</tr>
<tr>
<td>HR Processes &amp; Practices</td>
</tr>
</tbody>
</table>
Prioritizing & Best Practices

Basic Best Practices include:

- Documenting Information for Each Job Role
- Creating a Communication Process
- Planning for Succession from the Start
- Systematizing Idea Generation and Collection
- Knowledge Retreats
- Documenting Challenges and Solutions
KM Recap: Steps to Success

1. Just Start
2. Document!
3. Communicate!
4. Use it
KM Recap: Talk to Your Team
Remember: KM is like the ocean.
Questions?

TRUPP HR
Jean Roque
503.828.0255 | 855.TRUPPHR
jean.roque@trupphr.com
www.trupphr.com

EDIFY
Kristen Gallagher
503.734.0839
kristen@edifyedu.com
www.edifyedu.com

Program #255304

Program #15-W8KTG