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# APQC’s Knowledge Management Framework

## A Roadmap for Your KM Journey

When organizations approach APQC for advice and best practices in knowledge management (KM), they usually have an idea of the value knowledge sharing and collaboration can offer. Some have identified business challenges or opportunities that KM might help address but are unsure what specific goals to pursue or how to get started. Others have jumped in head first, implementing “random acts of improvement” (often involving new technology or localized KM practices). However, because the organizations have not tied their actions to cohesive KM strategies aligned with overarching business priorities, they have failed to achieve the results they expected.

APQC’s Knowledge Management Framework (Figure 1) provides a detailed roadmap to help organizations design, implement, and sustain their KM efforts. The framework relies on 30 years of KM best-practice research and implementation and is also available in an [interactive format](#). This article walks through key activities and expected results for the four phases of the framework: *Call to Action*, *Develop KM Strategy*, *Design and Implement KM Capabilities*, and *Evolve and Sustain*.

### APQC’s Knowledge Management Framework

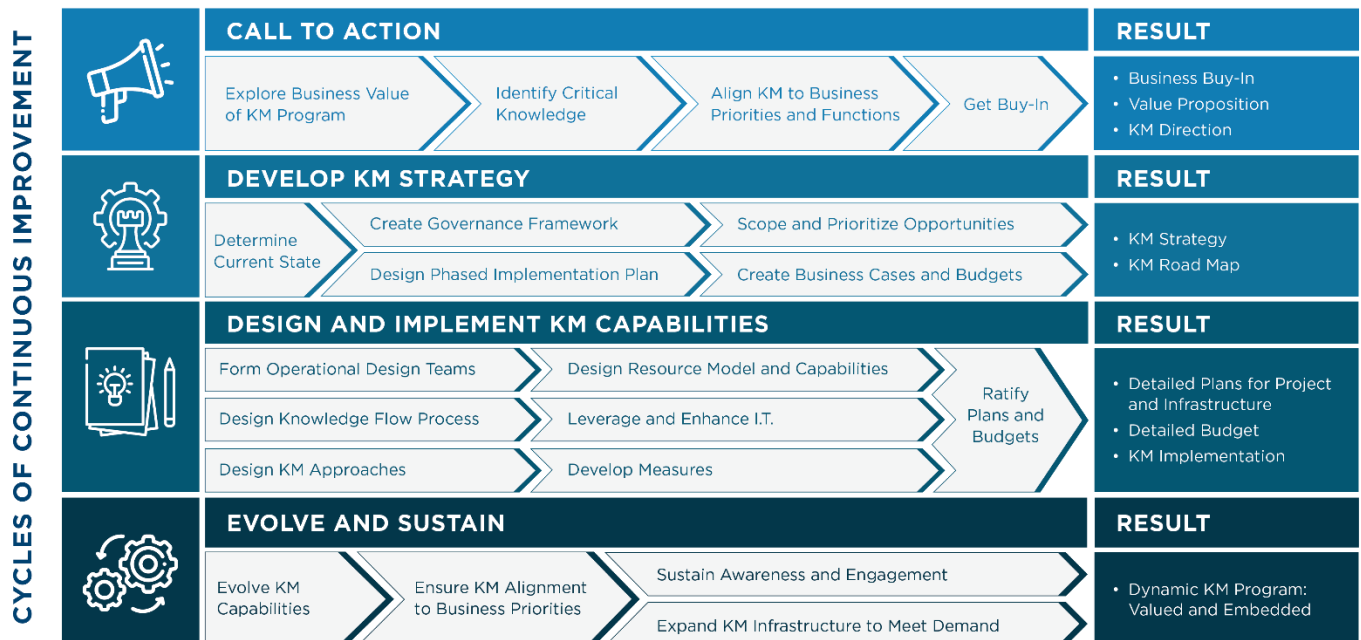


Figure 1

## Why Organizations Use This Framework

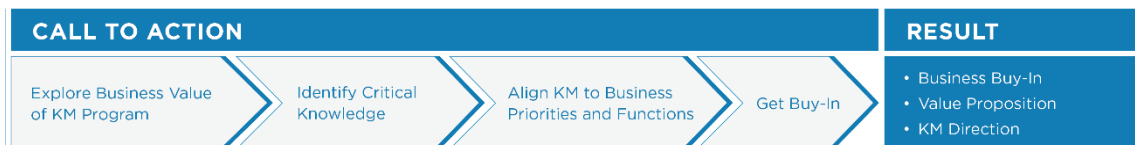
Before jumping into the framework's phases, it's important to understand when and why organizations use it. First, to successfully implement a new KM program. Organizations new to KM often start building infrastructure before they have outlined their strategies and aligned what they are doing to support business priorities. The framework helps organizations start at the beginning and articulate the value proposition and business case before developing specific tools, approaches, and solutions.

Organizations also use the framework to improve restart KM programs that are no longer delivering value, as well as continually improve and increase the maturity of programs that are already achieving some degree of success. For these organizations, the framework functions as a calibration tool.

"The framework helps you go back and determine whether you need to renew your focus on the business case or whether you've done everything you need to do to evolve and sustain the program," said Cindy Hubert, APQC KM Fellow.

After you understand the framework's phases, APQC recommends exploring our [Interactive KM Framework](#), which includes links to best practices, case examples, and tools and templates to help organizations at each phase of KM design, implementation, and sustainment.

### Phase 1: Call To Action



The first phase of the framework, call to action, gets people focused on and excited about KM. In this phase, the organization determines what it wants to achieve and what it will get in return for its KM investment. The act of articulating why the organization needs to improve knowledge flow and the potential benefits provides a way of thinking about KM in the context of organizational strategy and priorities. This, in turn, helps secure the executive sponsorship needed to turn the vision into reality.

#### Explore Business Value of KM Program

Start by defining the [value proposition](#) for enhancing the flow of knowledge within your organization. You should look closely at the organization's strategic goals and talk to executives to understand current and future knowledge needs.

#### Identify Critical Knowledge

An enormous amount of knowledge is created and shared throughout organizations every day, but not all of it is important. To use resources effectively, you must separate business-critical knowledge from the rest of the noise. Usually, the best approach is to look at the business strategy and pinpoint at-risk knowledge domains aligned with that strategy.

#### Align KM to Business Priorities and Functions

An organization's knowledge strategy should link directly to its mission and goals. Alignment often occurs at the level of the business units or functional areas. When KM activities further

strategic priorities, they are more likely to gain the support of senior leaders, who reciprocate by advocating for KM and modeling knowledge-sharing behaviors.

### Get Leadership Buy- In

Support from senior leaders is critical to KM sustainability. Executives lend credibility to knowledge-sharing and collaboration approaches and convey their importance to the organization, which increases buy-in across the workforce. The best way to secure endorsement from senior leaders is to align KM with business priorities.

### Result: Business Buy-In, Value Proposition, and KM Direction

<b>RESULT</b>
<ul style="list-style-type: none"> <li>• Business Buy-In</li> <li>• Value Proposition</li> <li>• KM Direction</li> </ul>

Once you complete this phase, you will have a clearly articulated value proposition linking KM to your organization’s knowledge needs and strategic goals. This value proposition, along with the critical knowledge areas you have prioritized, will guide the overall focus and direction of your KM effort. The value proposition is also a tool to communicate the potential benefits

of KM and help leaders understand how better knowledge flow can improve business results.

## Phase 2: Develop KM Strategy



### Determine Current State

The first step is to assess the capabilities currently in place to enable knowledge flow. This helps the organization identify gaps and prioritize focus areas. Essentially, you need to know your starting point in order to pinpoint improvement opportunities.

One of the best ways to determine current state is through [APQC’s KM Capability Assessment Tool \(KM-CAT\)](#), which measures KM across four assessment areas (strategy, people, process, content & IT) that contain 12 elements of KM maturity categories and represent the building blocks of effective programs. Completing the assessment shows an organization which capabilities it has in place, identifies areas of opportunity, and what specific actions it should take to reach the next level of KM maturity. This allows the KM team to pinpoint the projects it should take on and capabilities it should build.

### Create Governance Framework

Most successful KM programs are supported by [governance constructs](#) such as a KM steering or advisory team; a KM core team; and extended teams for design, technology, and engagement. Details vary based on an organization’s management structure and culture, but teams with defined responsibilities are necessary to ensure accountability and clarify how decisions are made.

### Scope And Prioritize Opportunities

Next, the KM core team must prioritize two to four capabilities to address in the first phase of KM implementation. The assessment of your current state, along with your value proposition

and business case, should help you determine where to focus your initial efforts. The KM-CAT results also help with this step.

As with any improvement process, the KM team should understand the stakeholders impacted by each potential project and leverage an agile approach. Start with small scale experiments and develop pilot projects to identify early value and and make adjustments before scaling to a larger audience.

### Design Phased Implementation Plan

After deciding on a set of priorities, you must determine how to address those priorities. What actions are needed to achieve the stated objective, and in what order should they occur? In short, you must lay out a step-by-step plan for design, implementation, and engagement.

In most instances, this includes both short- and long-term planning (e.g., a one-year implementation plan, a five-year vision and roadmap). The short-term plan should lay out all the major steps involved in the initial KM implementation and provide sufficient detail to enable resource planning and budgeting.

### Create Business Cases and Budgets

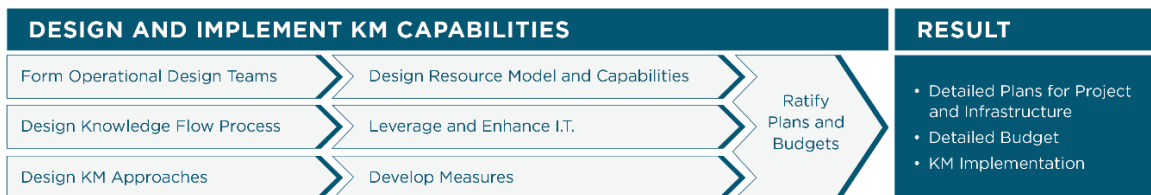
Your business case should lay out the details required to implement your KM strategy, including scope, objectives, measures, required resources, estimated costs and benefits, and a timeline with milestones and approval stage-gates. Backing up your business case should be a realistic budget that accounts for the range of costs involved.

### Result: KM Strategy and Roadmap

RESULT
<ul style="list-style-type: none"> <li>• KM Strategy</li> <li>• KM Road Map</li> </ul>

At the conclusion of this phase, you will have a detailed strategy based on your current status, what you would like to achieve in terms of knowledge flow, which areas you plan to tackle first, and where specific priorities fall on the timeline. Your governance framework, prioritization, implementation plan, business case, and budget will come together to provide a roadmap for KM implementation.

## Phase 3: Design and Implement KM Capabilities



Once you finalize your KM strategy, the next step is to turn that strategy into a reality. The KM team must operationalize its implementation plan and put [KM tools and approaches](#) in place to start generating business results. Many organizations are tempted to jump directly to this phase, but without developing a clear value proposition and strategy, they are unlikely to end up with focused KM programs that use resources efficiently in the pursuit of critical business objectives.

### Form Operational Design Teams

The design team for a KM project should include the people who will scope and plan the project as well as some of those who will execute it. The team is usually composed of a team leader;

relevant subject matter experts; and stakeholders impacted by the project, including both sources and recipients of the knowledge to be captured or shared. In many cases, an executive champion is assigned to secure resources and help with buy-in.

## **Design Knowledge Flow Process**

If you want knowledge to flow seamlessly through your organization, you must define how it will be created, identified, captured, reviewed, shared, accessed, and used. Tracking the flow of knowledge helps you pinpoint key handoffs and identify potential bottlenecks that may prevent knowledge from getting where it needs to go. This helps you design your KM approaches.

## **Design KM Approaches**

Every KM approach is different, and the “right” design depends on the reason the approach is being implemented, the desired outcome, the structure and culture of the organization, and the available resources. However, certain best practices apply across approaches, such as securing a management champion, aligning the approach to current workflows and routines, and making what you do scalable and replicable.

## **Design Resource Model and Capabilities**

KM approaches require clearly defined roles and responsibilities in order to flourish. For example, what is the [KM core team](#) accountable for, and which tasks fall to the business units? If the organization launches a new community, who will lead it and manage its content? By establishing and communicating the resource model, you ensure that stakeholders understand what is required of them to ensure the flow of knowledge. This is the next level of detail underpinning the governance structure.

## **Leverage and Enhance Technology**

Everyone knows that technology is key to effective KM, but your strategy and design decisions should drive your IT investments, not the other way around. APQC finds that successful organizations tend to avoid technology fads, opting instead for streamlined tools that fit into their existing infrastructures and provide capabilities aligned with their most pressing needs. They then add tools and capabilities over time as the scope of the KM program expands and the needs of the business evolve.

## **Develop Measures**

For a new KM approach, initial measures tend to focus on adoption and participation, along with anecdotal evidence regarding application and satisfaction. Over time, the spotlight shifts to assessments of value such as impact on costs, cycle times, quality, safety, or other strategic indicators. These types of business impact measures demonstrate the importance of KM to the organization and are more compelling to senior management and the workforce as a whole. [APQC’s KM Measurement Alignment Worksheet](#) can help you align KM measures to what matters to the business.

## **Ratify Plans and Budgets**

The final step is getting your detailed plan and budget approved. The exact process will depend on your organization’s structure and how KM is funded, but APQC recommends supporting your plan with data and soliciting feedback from stakeholders at key intervals, instead of waiting to the end of the planning process.

## Result: Dynamic Plans for Project and Infrastructure, Detailed Budget, KM Implementation

RESULT
<ul style="list-style-type: none"><li>• Detailed Plans for Project and Infrastructure</li><li>• Detailed Budget</li><li>• KM Implementation</li></ul>

At the conclusion of this phase, your program will be up and running: You will have a set of KM approaches supported by a clear resource model, enabling technology, and measures to evaluate success. While you will have detailed plans and budgets to guide you forward, these must be dynamic to accommodate cycles of continuous improvement as well as changes affecting the organization and the market.

## Phase 4: Evolve and Sustain



Once an organization’s KM program is up and running, it moves into the evolve and sustain phase, which encompasses expansion, maintenance, and continuous improvement. A critical element is scaling up KM capabilities and approaches where appropriate. “When you first launch, you’re going to want to start with pilot projects” limited to a small subsection of the organization, Hubert said. “If you decide it works well, you take that same model and scale it up to a division or maybe the whole organization.”

APQC recommends using the KM-CAT during this phase to assess progress at key intervals. By pinpointing areas that show the most improvement and gaps that continue to hold the program back, the assessment results help KM teams determine where they should focus their resources to obtain the highest return on investment.

### Evolve KM Capabilities

The best KM programs continually evaluate where they are in relation to goals, look for ways to improve their offerings, and become more mature and embedded. APQC’s KM-CAT is one tool to gauge your progress, identify gaps, and prioritize areas for improvement.

### Ensure Alignment to Business Priorities

As your KM program advances, it is important periodically to recalibrate your KM strategy against the organization’s broader strategic vision and objectives. Both the business and the KM program may shift focus over time, and you want to ensure that the [KM portfolio](#) continues to target the most critical needs of the business. If your organization has an annual or biannual planning process, this is usually a good time to reaffirm the strategic links.

### Sustain Awareness and Engagement

Successful organizations actively promote their KM tools and approaches and encourage employee engagement. Efforts often encompass a strong change management strategy that includes training, branding and communications, visible support from leaders, rewards and recognition for demonstrating desired behaviors, and links between KM participation and professional development/career advancement.

## Expand Infrastructure to Meet Demand

When you design pilot projects or limited deployments of KM tools and approaches, you want to ensure that the infrastructure you put in place is scalable. This kind of forethought makes it much easier to build on successes and make KM capabilities available to more of the workforce. While some organizations have achieved positive results with isolated grassroots implementations, APQC recommends [scaling up](#) to a standard, enterprise-wide vision for KM where possible.

## Result: Dynamic, Valued, and Embedded KM Program

### RESULT

- Dynamic KM Program: Valued and Embedded

The result is an effective KM program that is adaptable and sustainable over the long term. KM will be embedded in your processes and operations, and employees will recognize the role that knowledge sharing and collaboration play in individual and organizational performance. Fully integrated into the flow of work, KM activities will support innovation and drive competitive advantage.

## Learn More

For tools, template, and additional guidance, see APQC's [Knowledge Management Framework collection](#) and the [Interactive Knowledge Management Framework](#).

## About APQC

APQC (American Productivity & Quality Center) is the world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management (KM). With more than 1,000 member organizations worldwide, APQC provides the information, data, and insights organizations need to support decision-making and develop internal skills. [Learn more.](#)

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