Integrating KM Into Change & Improvement

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“Driving Business Performance: The New Face of Collaboration”
Introductions

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MetLife – Business Unit

 Benefit Services Organization in MetLife’s US Business unit
  • KM has been deployed for 7 plus years
    – Document Management
    – Intranet, Collaboration, and Innovation
    – Procedural documentation, job aids, and other job related information
Agenda

• Building the Dream

The Approach
• Situation
• Elements
• Driving support, participation, & change
• Impacts; metrics & measures

• Sharing the Dream

• Living the Dream

Close your eyes & insert your mental graphic here
Building the Dream

...building the foundation for using KM to drive change & improvement

“Hold on to your dreams for they are, in a sense, the stuff of which reality is made. It is through our dreams that we maintain the possibility of a better, more meaningful life.”
Leo F. Buscaglia (American guru, tireless advocate of the power of love, 1924-1998)
About This Section – **Foundation**

- **Situation** – Build on a solid and flexible foundation that supports the business and leverages core KM principles, concepts, and techniques.

- **Elements - Examples**
  - Messaging: why KM is important and what it is
  - How KM is connected to the success of the business
  - Connecting with change and improvement through learning & development and a quality management system

- **Driving support, participation, and change**
  - Partnership with Quality Management and Learning & Development for improvement and change
  - Partnership with business at all levels

- **Impacts**
  - Leadership awareness and understanding of KM’s value, approaches, & services
  - Informed and committed leadership and management
  - KM strategy aligned with the business strategy
  - KM needs/opportunities identified; prioritized KM solutions enabling strategies
Knowledge Is Power – Four Truths (1 of 2)

• Knowledge is a foundational business enabler

  “There is no substitute for knowledge…Ideas, more than money, are the real currency for success.”
  Eli Broad, founder of two Fortune 500 companies

• Business runs on what is in the minds of associates and the knowledge they create, capture & use

  “In a time of turbulence and change, it is more true than ever that knowledge is power.”
  John Fitzgerald Kennedy (American 35th US President (1961-63), (1917-1963)

(Why KM is important example)
Knowledge Is Power – Four Truths (2 of 2)

• **How we use** knowledge is **fundamental** to success

  “Knowledge is only potential power.”
  Napoleon Hill (American author, 1883-1970)

• **Creating** new knowledge is how we **break away**

  “Innovation is the central issue in economic prosperity.”
  Michael Eugene Porter (born 1947) Management Consultant and Bishop William Lawrence University Professor at the Harvard Business School

**NOTE:** We also show more “impact” slides for example: time saved, quality improvement, business metric improvements, service improvements

(Why KM is important example)
Knowledge Management (KM) Vision
(What we want to be)

Knowledge . . . Powering the Enterprise

We are stewards guiding the business to leverage its knowledge to power success.

(KM connected to the business - example)
Knowledge Management (KM) Mission (Why we exist)

WHAT

As stewards, ensure knowledge integrates across people, processes & technology to power success.

HOW

By providing the right knowledge, to the right people, at the right time, and in a way that is fast and easy to use.

(KM connected to the business - example)
KM Strategy

(KM connected to the business - example)

Grow the Top Line

- Improve sales, marketing, & product development
- Improve Customer Service: responsive & accurate
- Improve efficiency: reduce rework & time to find/use; leverage lessons learned
- Control storage/technology costs & improve compliance/reduce risk

Knowing & Finding (capabilities)
- Governance/Strategy
- Quality
- People Focused
- Access

Using & Creating (capabilities)

Impact the Bottom Line

Governance/Strategy - Quality
- People Focused
- Access

KM (core)

MetLife
KM Strategy Alignment Model (KM connected to the business - example)

(aligning for change and integration)

- KM Platform: Support Achieving the Strategy
- Governance & Controls
- Solution Portfolio
- Cost Controls

- KM Team & Partners

- Enterprise Initiatives – Embedded KM Elements
- LOB Initiatives – Embedded KM Elements
- Business Unit Initiatives – Embedded KM Elements
Integrated with Learning to Power Change (Knowledge powering learning)

- Classroom Training
- eLearning
- On the Job Training
- Mentoring/Coaching

Experts

Collaboration

Learners

Innovation

Performance Support

Knowledge Repositories

(KM driving change - example)
Integrated with QM to Power Improvement
(Knowledge powering quality)

Quality Management System
Sharing the Dream 1

Governance and Business Involvement

“We the People . . . “
About This Section – **Sharing 1**

- **Situation** – As knowledge owners, the business makes the decisions about how knowledge will be used and managed; provides resources; plus sets strategy and priorities.

- **Elements - Examples**
  - Governance models and elements
  - The people within the governance
  - The processes

- **Driving support, participation, and change**
  - Business at all levels involved in all aspects of KM & supports KM solutions/processes
  - Selected business associates become an extension of the KM Team to drive change and improvement
  - Business support and participation drives change through integrating

- **Impacts**
  - The business leads and takes ownership
  - Knowledge created, updated, and controlled by the business
KM’s Core Governance – Example Model

**KM’s Core Governance**

- **Strategy**
  - (Creation, Updating, Drive Change, & Alignment)
- **Roadmaps**
- **Initiatives**
- **Projects**
- **Priorities**
- **Solutions & Applications**
- **Systems**
- **Processes**
- **Policies & Guidelines**
- **Support**
- **Metrics**
- **Reports**
- **Resources**
- **Roles**
- **Responsibilities**

**Role**

- **Strategy**
- **Direction**
  - (Priorities, Issues, Requests & Decisions)
- **Advocate & Influencer**
  - (Communicate, Educate, Persuade, & Partner)
- **SME**
  - (KM Expert, Initial Support, Training & Drive Change)
- **Represent Users**
  - (Provide Needs, Feedback, Transition & Issues)

**LOB**

- **Leaders**
- **Managers**
- **Associates**

**Impacts**

- **Strategic**
- **Tactical**
- **Both**
The Elements of Governance

(We the People . . . )

• Representatives partnering with KM as the Stewards
  – Champions/Coordinators; plus owners, stakeholders, and SMEs

• Strategic alignment

• Success defined

• Planning Cycle and Integration

• Intake Processes

• Support Process

• Creation/Update/Call Up Processes
“If wisdom were offered me with this restriction, that I should keep it close and not communicate it, I would refuse the gift.”

Seneca (c. 4 BC – AD 65) was a Roman Stoic philosopher, statesman
About This Section – **Sharing 2**

- **Situation** – Drive change through the use of marketing and communication.
- **Elements - Examples**
  - Marketing: logos, tag lines, posters, shirts, brains, mascots, calendars
  - Communication: brochures and various messaging
- **Driving support, participation, and change**
  - Business leaders sharing the messaging and presentation
  - Leverage leadership support and governance
- **Impacts**
  - Greater awareness, understanding, changes in behaviors
  - Improved depth and speed of acceptance and usage
Marketing (1 of 4)

Brand/Logo

Tag Lines

Banners

© United Feature

... knowledge in motion
Marketing (2 of 4)

Posters

Shirts

Squeeze Brains
Marketing (3 of 4)

Mascot

Calendar

Knowledge Management
2007 Knugget Calendar

“If you have knowledge, let others light their candles at it.” Margaret Fuller
Thank you for bringing in one of KM’s most wanted! To collect your bounty on the nefarious N. Complete, Er O. Neous, or Outah Date, please complete the information below and hit submit.
Communications - Sampler

• Communication plans for initiatives, solutions, updates, etc.
• Communication standards and email templates
• Web pages: who we are, what we do, and KM support information
• KM project overviews, project completion summaries
• Webinars and demonstrations
• “What’s Possible” presentations
• Road shows in support of initiatives
• Presentations library
• Electronic scavenger hunts
• Status reports and results
Living the Dream

. . . assess, design, & implement

“At first, I am giving energy to the creation, but later the creation seems to be giving energy to me.”

Robert Fritz (1920 -1986) An American ceramics and glass artist and professor at San Jose State University in California
About This Section – **Living**

- **Situation** – Making KM work for the business.
- **Elements - Examples**
  - Tools and solutions
  - Projects
- **Driving support, participation, and change**
  - Business involvement in solution designs and implementations
- **Impacts**
  - KM tools created and used in the gathering of needs, designing solutions, and implementing solutions
  - KM solutions designed and implemented to meet business needs
  - A portfolio of reusable KM solutions
Examples - Tools

NOTE: Includes partnerships with Quality Management and Learning & Development

• Business KM Needs Assessment
  – Used to identify KM solution opportunities
  – Input into planning process and opportunities intake process
  – Generates KM Solution projects

• KM Project Scoping Tool
  – Used in the project planning process to facilitate meetings and discussions
  – Also markets KM Team

• KM Solutions Portfolio

• Design and Prototyping

• Project Management Tools

• Methodologies and Templates
Examples – Projects (1 of 2)

• Culture Change: Service Principles, major strategic initiative that drove common customer service model
  – Web site supporting rollout and communications
  – Created and managed knowledge repository, examples, updates, etc.
  – Partners: leadership, project team, communications team, learning and development, Knowledge Champions, and Knowledge Coordinators
  – Impacts: Associate high level of awareness, understanding, acceptance, and usage

• Process Change: Sub-team for major process reengineering initiative
  – Repository of change management and communication content
  – Community of practice for the change management team, collaboration/sharing
  – Web page; background, info, and updates
  – Partners: leadership, project team, HR, communications team, learning and development, and Change Champions
  – Impacts: Associate high level of awareness and understanding; Leadership awareness of usage and acceptance levels
Examples – Projects (2 of 2)

• Process Improvement – Reengineering initiative for core operational processes
  – Repository for the project, reengineered process documentation, and job/task reference materials
  – Updated web pages with job-related knowledge and links to experts
  – Partners: leadership, project team, communications team, and learning and development
  – Impacts: Usage and time saved; fully trained associates using supporting KM solutions

• Sales – Faster and easier access to marketing information
  – Web site created and updated
  – Knowledge repository for selected marketing knowledge
  – Partners: leadership, project team, and marketing
  – Impacts: Anticipate improved sales (anecdotal measures)
Appendix

*More details*
The Elements of Governance
(We the People . . . )

• Representatives partnering with KM as the Stewards
  – Multi-level, inclusive, and cross-organizational committees/teams
  – Make decisions and recommendations, set priorities, and champion KM
  – Review and provide feedback for plans, marketing, and communications
  – Create formal charters, roles & responsibilities, profiles

• Strategic alignment
  – Representatives align and integrate KM strategy with business strategy
  – Ensure continuous focus on integrating KM into the business at all levels
  – Make adjustments to stay aligned

• Success defined
  – Establish process to measure and show success
  – Track and report results; adjust strategy and tactics as needed
  – Link to people’s performance; provide evaluations
  – Celebrate success and recognition
More People/Roles in “We the People . . .”

- In addition to the Knowledge Champions and Knowledge Coordinators, other roles are needed to govern the content

- Content Owners
  - Identifies SMEs and stakeholders, sets creation and update priorities, access rights approvals, directs/approves retirement/retention/archiving of the content

- Stakeholders
  - Strong connection to the content and/or the usage of the content

- SMEs
  - Provides new content and content updates; viewed as an expert, provides answers to questions
The Processes in “We the People . . .”

- **Planning Cycle and Integration**
  - Annually, integrate KM into business initiative planning & deployment at all levels
  - Integrate with all related ongoing planning and deployment processes at all levels
  - Meetings, meetings, and more meetings

- **Intake Processes**
  - Opportunity tracking and dispositioning of those opportunities
  - Business as usual (BAU) requests and tasks

- **Support Process**
  - Ensure effective use of KM solutions for change & improvement
  - Issues, administrative requests, questions, assistance, and training

- **Creation/Update/Call Up Processes**
KM Team Services
(Skills & experience for change and integration)

• Strategic Planning – Aligning for Impact
  - Alignment with, enablement of, and support for business strategy
  - Strategic and tactical planning and updating, KM roadmap
  - Technology roadmap and platform funding/SLA, planning & updating

• Internal Consulting & Project Management – Selecting Solutions & Implementing
  - Consulting: assessments, analysis, recommendations, pilots & implementations/deployments
  - Project management
  - Advice and guidance
  - Great working relationships with partners, stakeholders, and internal customers

• Support & Training – Enabling Associate Usage
  - Configure/maintain systems
  - Issue/problem resolution and tracking (2nd level)
  - Reference materials and job aids
  - KM specific training; development and delivery
  - Work closely with Knowledge Champions and Knowledge Coordinators, and Content Owners/SMEs

• Process Oversight and Management – Measuring/Managing for Success & Opportunities
  - Process design/creation and improvement/redesign
  - Metrics
  - Monitoring, reporting, audits, and quality reviews
  - Technology and solution upgrades, testing, and planning
On-Line Brochure 1

Knowledge in Motion

The Knowledge Management Group partners with MetLife organizations to deploy innovative solutions that capture knowledge and foster collaboration. The combined expertise of the team allows them to identify, create, and distribute the best solutions to meet the business needs. The team helps organizations improve performance, share lessons learned, and continuously improve.

WHAT IS KNOWLEDGE MANAGEMENT?

Knowledge is expertise and skills acquired by a person through experience or education, which is used for performing tasks, solving problems, and making decisions.

Knowledge Management is an approach that integrates experience and information with processes to achieve business objectives by providing the right knowledge, to the right people, at the right time, and in a way that is fast and easy to use.

THE VALUE OF KNOWLEDGE MANAGEMENT

- Improve Customer Service by providing associates with the tools to deliver a consistently superior quality experience
- Increase revenue by getting products and services to market faster
- Streamline operations by eliminating redundant or unnecessary processes
- Reduce cost by eliminating rework and recapturing time
- Foster innovation by encouraging the free flow of ideas
- Enhance employee retention by recognizing the value of employees’ knowledge and rewarding them for it
flexible solutions for your business needs

KNOCKNOWLEDGE MANAGEMENT SOLUTION PRINCIPLES

CONTROLLING: Provide processes, systems, monitoring, reporting, compliance, cost effectiveness and controls, and governance to manage critical business knowledge.

PURPOSING: Provide logically grouped related folders and links based on role, task, and context. Also provide Enterprise search, which enables associates to find needed knowledge.

INTEGRATION: Provide contextual knowledge in applications/workflow at time of need.

PROACTIVITY: Anticipate contextual knowledge needed for specific roles and tasks.