Using Knowledge Management-Performance Improvement to Enhance Organizational Efficacy

TRADOC Chief Knowledge Officer
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What is Knowledge Management – Process Improvement (KM-PI)?:

- Enables organizations to create, store, & access knowledge products & services effectively
- Captures critical decision making data within real-time dashboards & knowledge portals
- Empowers change by stimulating innovation, collaboration & process improvement
- Facilitates knowledge flow that supports decision making & increases organizational efficacy

**KM-PI Synergy**

**KM-PI Development**

**Characteristics**

- **Decisions**
  - Informed & Timely
  - Objective/subjective

- **Knowledge**
  - Timely Creation
  - Transferable
  - Actionable
  - Supports Decisions

- **Information**
  - Visible, Accessible, & Transportable with Governance & Security

- **Data**
  - Quality
  - Authoritative

**People & Organizations**

- Wisdom Experience
- Systems & Processes
- Tools, Tech & Training

**Data/Content**

- Knowledge
- Systems & Processes
- Tools, Tech & Training

**Cultural Shift**

- Skilled & Trained Workforce
- Enterprise Perspective

**Organizational & Personnel Efficacy**

- Staff Integration
- Visible, Accessibility & Transportability

**Sharing/Knowledge Flow**

- Authoritative Data
- Cultural Shift

**KM-PI Synergy & Development**

**Harvesting Knowledge to Empower People & Organizations**
Senior Leader Guidance and Charter

Marching Orders: 38th CSA, US Army (Jan 12)
• Intent: Sustain; Provide agile, responsive and effective Soldiers, Leaders & Organizations; Ensure flexibility for national security decision-makers
• Endstate: Army in Transition; most decisive land force in the world

Leader Expectations
– Have a vision & lead change
– Be your formation’s moral & ethical compass
– Learn, think & adapt
– Balance risk & opportunity to retain the initiative
– Build agile, effective, high performing teams
– Empower subordinates & underwrite risk
– Develop bold, adaptive & broadened leaders
– Communicate – up, down & laterally

Characteristics of the Future Force
– Depth & Versatility
– Adaptive & Innovative
– Flexible & Agile
– Integrated & Synchronized
– Lethal & Discriminate

TRADOC CG Priorities (1 Jul 13): Adapt TRADOC

TRADOC DCG Guidance (Feb 13):
• Enhance Knowledge Management & include Process Improvement
• Shift CKO from an enabler to a major driver of change
• Facilitate decision making, & effective knowledge transfer
• Focus on organizational efficacy & work process improvement
• Assess effectiveness & demonstrate ROI on our time & resources
• Integrate KM-PI within TRADOC & between HQDA, ACOMs & enterprise partners
KM-PI Strategy and Implementation Plan:

- Identifies the true “cost-benefit” of each project separately (enterprise solutions, specific projects)
- Identifies Value Added to the command(s) and how it links to our requirements and CG’s Priorities in respect to TRADOCs Core Functions, Future Initiatives & Legacy Activities
- Identifies required behaviors and critical cultural change

**Integrated TRADOC KM-PI Strategy**

**Strategic (Ends)**

- Links projects & tools to strategic goals, core competencies & CG priorities

**Role of KM-PI/Drive Change**

- Main Effort: HQ/CoEs/Sub Orgs
- Ongoing projects, value added & risk if not completed

**Operational (Ways)**

- Main Efforts: Projects, Initiatives, etc.

**Tactical (Means)**

- Tools, Tech & Training, Systems & Processes, Data & Content (SharePoint, CoP, Dashboard, DCO)
Vision: Foster a Dynamic Knowledge Environment that fully integrates efforts to support strategic initiatives with competent professionals, enterprise systems & processes, & efficient use of resources to enhance intellectual capital, knowledge transfer & organizational efficacy.

Dynamic Knowledge Environment
“Leveraging knowledge to enhance organizational efficacy”

Characteristics:
• Continuous learning environment

• Agile, adaptive & effective personnel & organizations

• Enhanced knowledge agility (acute, critical thinking in uncertain & complex environment)

• Integrated, collaborative environment at all levels from individual to enterprise

• Horizontal & vertical integration of knowledge assets

• Enhanced cross-functional matrix organization performance
KM-PI Capabilities & Competencies

Capabilities
“Broad based capabilities that drive results and support the command’s objectives, goals & endstate”

KM-PI Capabilities:
• Enhance organizational learning agility, adaptability & responsiveness to facilitate change

• Enable enhanced experiential learning, mentorship & talent development to increase knowledge agility

• Stimulate & harvest innovation & work process improvements to enhance performance

• Enhance organizational measurement & analysis to achieve performance excellence

• Enable timely, fact based decision making to empower people & organizations

• Increase organizational efficacy & resource reinvestment to achieve outcome based, resource informed solutions

Core Competencies
“What makes our organization different and what unique value do we provide”

KM-PI Core Competencies:
• Knowledge Management Services

• Process Improvement Services

• Data & Content Management (structured and unstructured)

• KM-PI Training and Education

• Knowledge creation, organization, application & transfer

• Enterprise Collaboration

• Measurement, Reporting and Assessment
KM-PI Functions, Roles & Responsibilities

Major Organizational Functions
“Functions we perform within our core competencies”

KM-PI Functions:
- Create, organize, apply and transfer knowledge
- Manage robust Knowledge Networks
- Identify and implement enterprise solutions
- Deliver knowledge displays (CoPs, Dashboards, etc)
- Manage knowledge tools application
- Perform process mapping, design and management
- Knowledge audits and assessment
- Facilitate data and content management
- Identify and access authoritative data sources
- Provide formal KM-PI and tool training
- Support school learning communities
- Support “Point of Need” learning
- Provide knowledge transfer between operational and institutional organizations
- Support metric development and performance measurement

Roles & Responsibilities
“Identifying organizational & personnel roles aka…what we have to do as we change”

KM-PI Role Characteristics:
- Articulate KM-PI organizational & personal roles & responsibilities
- Identify governance and management functions
- Identify and lead implementation of comprehensive enterprise solutions
- Inform organizational and personnel changes
- Identify necessary skills and training
- Inform resource decisions
What is Organizational Efficacy?

- Organizational Efficacy is an organization’s capacity for producing a desired result or effect.

- Producing desired results and effects is the only way organizations can demonstrate value and justify their claims to resources.

- Measures of effectiveness (metrics) are the best way for organizations to demonstrate value.

- Branches, departments, units within organizations are organizations.
 Metrics Answer Vital Questions

- How do we know we are on the track to success? (Lead indicators)

- To what extent do metrics reflect the customer’s requirements?

- To what extent do they reflect a consensus between provider and end-user on the definition of success? (Outcome focused)

- Do they identify, quantify and/or qualify the “causes of success”? 
Metrics Confirm Organizational Efficacy

Identify End-users (Customers) and Providers

Develop independent data gathering

Reach consensus on metric definitions and scales

Assess effectiveness and demonstrate ROI on our time and resources while working toward objectives and the desired endstate

Establish clear requirements for each customer & provider

Collaborate to develop measures of success
Metrics Demonstrate Organizational Performance (Identify and confirm changes)

Organizational Requirements (Mission)

- Re-evaluate metrics (value indicators)
- Improve systems, processes, tools, tech & training

Identify overarching goals & endstate

Identify End-users (Customers) and Providers

Identify Objectives

Establish clear requirements for each customer & provider

Collaborate to develop Measures of success

Reach consensus on metric definitions and scales

People & Organizations

KM-PI

- Systems & Processes
- Tools, Tech & Training
- Data/Content

Develop independent data gathering

“See Yourself” Assessment

Integrate Feedback
The Dynamic Knowledge Environment and its Value to Leaders

Examples of organizational efficacy:

• Effective collaboration tools increase quality of organizational outputs (products)
• Streamlined organizational processes that save time, manpower and money
• Matrix management processes provide awareness of and access to SMEs across the organization
• Reporting tools reduce time required and increase quality of informed decisions
• Data and content management facilitates access, organize, apply and transfer of information and knowledge
• Robust search capacity speeds production and informed decision making
• Enterprise solutions provide standardization and efficiency to facilitate speed of knowledge

How you will see it: (behavior & products)

• Team members invested in organizational goals
• Team members understand their contributions, where to get the information & how to develop value
• Increased innovation & performance management
• Open sharing of information & accountability
• Individual Dashboards & COPs
• Robust Knowledge Networks
• Interactive WfFs
• Collaborative cross-function work groups

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