



June 2018

Knowledge Management pilot projects; What they are and how to choose them



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This newsletter is about [Knowledge Management Pilot projects](#) - those early stage projects you set up as part of KM implementation to prove the concept, deliver quick wins, and test the KM Framework.

It looks at what KM pilot projects are for, how they work, and how you can select a portfolio of projects best suited to supporting your KM implementation and culture change program.

The need for KM Pilots

The early stages of Knowledge Management Implementation often involve testing and piloting. We can look at these as two different things:

Tests are where you apply a single KM tool, process or technology to a single business issue, in order to demonstrate that it can be applied in your organization ("proof of concept"). A proof of concept trial usually lasts a few days, or weeks at the most.

[A Knowledge Management pilot project](#) where you apply a complete (but often simplified) KM framework to a business problem, in order to solve the problem, deliver value, gain knowledge and create success stories. A KM pilot can last several months, or even a year.

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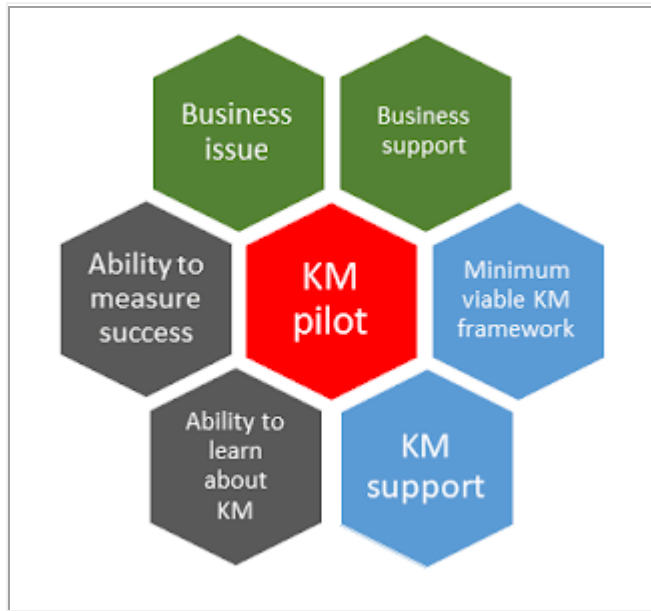
[Vedalis blog](#) in French

[Ewa's blog](#) in Polish

[Knoco on YouTube](#)

It is important to distinguish between these two. As we know, one tool alone does not deliver value to the business, and a test of a single tool therefore will prove the viability of the tool but will not itself prove the business value of KM. For value delivery, you need to pilot a [Knowledge Management framework](#), even if it is a Minimum Viable framework. The KM pilots have four objectives;

- The first few pilot projects will be "proof of value" projects, and people will be watching them closely to see if knowledge management works, and adds value, in your organisational context. You may meet many people within your organisation who say "yes, knowledge management sounds fine, and I can understand how it worked in Ford, or Shell, or the Army, but our business is different". A successful pilot project will demonstrate that [knowledge management can deliver value](#) in your own business.
- Secondly, the pilot project will deliver a lot of learning about how knowledge management works in your business, and how knowledge management can be implemented in your culture. It is a test-bed for KM implementation.
- Thirdly, if the pilot is successful, it will deliver monetary value to the organisation, and so should be worth doing in its own right as a value-adding "Quick Win".
- Finally, you should be able to get some good marketing material from the pilot project, in terms of stories, endorsements, quotes and video. This will be incredibly valuable for the roll-out phase, and the success stories you record from the pilot will help to change the culture.



[Contact Knoco](#) if you want more help with understanding the need for [KM pilot projects](#).

What sort of project makes a good pilot?

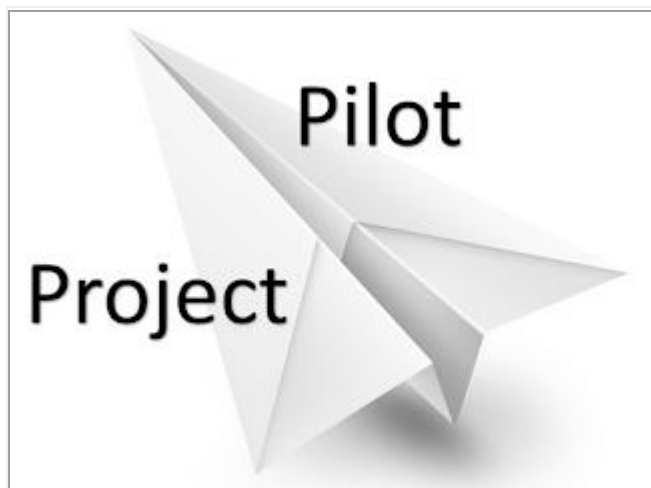
A pilot project needs to use KM to solve a business problem. The pilot must be problem-led, not solution-led; it is the application of KM to a business problem, and not a general test of a KM process or technology. The focus of the pilot is on business issues, as the purpose of Knowledge Management is to solve business problems, and the purpose of the pilot is to test and demonstrate that KM can do what it is supposed to do. The examples below should help make this clear:

- "Creating a Sales portal" is not an effective pilot, but "using KM to improve our sales figures in Germany" is.
- "Testing a better search engine" is not an effective pilot, but "using KM to reduce costs in our new product production line" is.
- "[Launching a community of practice](#) for geologists" is not an effective pilot, but "using KM to improve our geological predictions" is.

In most cases, your pilot will cover multiple divisions, or multiple projects, and will look at ways of developing, sharing, transferring and re-using knowledge to solve business issues.

The problem must somehow be knowledge-related, if KM is going to help, and there are four potential types of problem you can look for:

- Where there is a business critical activity which is new to one part of the organisation, where rapid learning will deliver business benefits. If it is new to only one part of the organisation, then transferring learning from where it has been done before, will give huge benefits.
- Where there is repetitive activity, and where continuous improvement is needed, in which case knowledge management can help drive down the learning curve.
- Where there is activity which is carried out in several locations, and where performance level varies, in which case knowledge management can help exchange knowledge from the good performers, to improve the poor performers.
- Finally where there is an area of the business which is stuck due to lack of knowledge, in which case knowledge management can help develop the knowledge needed to get unstuck.



[Contact Knoco](#) to learn more about knowledge management.

The KM "minimum viable product"

If KM is to solve a business problem, then a KM framework will be needed, but it doesn't need to be a complicated or expensive framework; it can be the simplest one you can manage. There is a concept in lean manufacturing known as the "minimum viable product" (MVP). This is a very valuable concept to bear in mind when first piloting Knowledge Management. The MVP is the simplest and easiest version of the product you can build that delivers customer value. In the software industry, the developer builds and releases a completely bare-bones MVP version of a product in order to get customer feedback learn about the product in use, and get some revenue. We can use the same approach when it comes to KM, and can pilot a bare-bones KM Framework in order to get user feedback and demonstrate some value.

There are two key words in the MVP phrase:

- Firstly the product should be **viable**. In other words it should solve the customer's problem, add value, and provide a complete experience to the early adopters. The diagram below illustrates the principle. If you were creating the first car by a lean and agile process you would not first release the wheels, then the axle, then the coachwork, as none of these elements on their own are viable. It would be better to develop a powered skateboard, then a powered scooter, then a motorbike, so that at each step you provide the complete experience of powered wheeled transport.
- Secondly the product should be minimum. It should be the smallest subset of features that delivers value, because this is your starting point to learn about how the user interacts with the product, and which then allows you to take the next development step. In KM terms, perhaps you use a display board instead of a portal, or Excel instead of a lesson management system, or meetings instead of online collaboration, or use volunteers rather than setting up new KM roles.

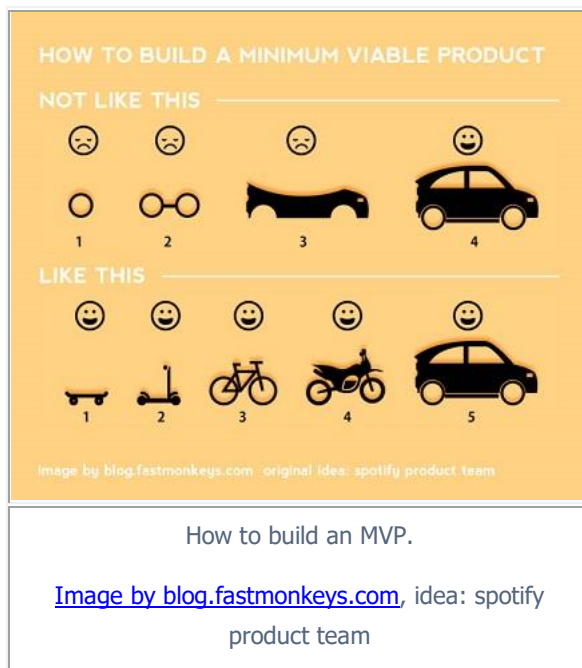
The Knowledge management version of the MVP is the Knowledge Management pilot - that first release of a knowledge management solution to a group of early adopters in the business, in order to test the concept and deliver business value. The minimum viable product is therefore the simplest possible KM framework you can release.

As an example, if you want to pilot KM in an area of the business where knowledge needs to be shared between multiple business units you could take one of two approaches. The all-too-common approach is to introduce a technology (Yammer, for example, or Jive) and

anticipate that people will start to use it. However this is neither minimum (both of these technologies are well-developed, with many features), nor is it viable (technology alone will not work).

Better to introduce a simple framework such as a community coordinator (role) who sets up monthly discussions (process) using dial-in conference calls (technology) to discuss an identified agenda of critical knowledge issues (governance). Once the community realises this minimum system adds value, then they can start to build upon this system until they have a KM Framework that fully meets their needs.

Apply a lean and agile approach; start with your MVP framework, introduce "the KM skateboard", test it with the users, learn from it, and build the next improved version. Pretty soon you will have your KM Porsche



[Contact Knoco](#) to learn more about KM MVPs.

How to rank and select a KM pilot

When you start looking around, you will find very many business opportunities for KM piloting. Your "opportunity jar" will soon be full to overflowing, and you will need to find a way to compare and rank

these piloting opportunities. We have a set of ranking criteria we have been using for about 15 years now, which includes looking at the following 4 questions;

- If the project is successful, can we measure the value, and so demonstrate that the pilot has "worked"?
- Is there is strong management support for the pilot, and for knowledge management, within the potential pilot area?
- If we create knowledge, is it purely for the pilot team or can others use it across the business, allowing us to leverage the results and spread the benefits?
- Finally, can we practically complete the pilot in the required timeframe and with the resources available (money, staff, KM support resource etc.)?

Any pilot where you can answer a strong YES to all of these questions, will be a top-ranking pilot, suitable for selection as part of your KM program.

Do as many pilots as you can handle, and no more. The process you need to decide which pilots to undertake is as follows: Canvas the business to find out a list of business issues which KM can help solve. Rank the pilots against the 4 criteria above, and, starting with the top ranking ones, select as many as you can support given the time and resources. Also try to select a portfolio of pilots that will test all elements of the KM framework. In BP, for example, with our central team of 12 full-time KM staff, we ran 4 pilots at once. In Mars, with a smaller team, they ran 2 a year.

Typical pilot projects we have been involved with include:

- Reducing the cost and time of refinery maintenance shutdowns;
- Increasing chocolate sales in developing-world countries;
- Reducing defects in telecoms software;
- Winning government hospital contracts;
- Improving underground mining techniques;
- Improving safety in a power transmission utility;
- Regional analysis of sedimentary basins.

[Contact Knoco](#) for advice on ranking and selecting your pilot projects.

How to run a KM pilot

A KM pilot project has a series of stages, much like any other project. The stages are these:

- Initially you need to raise awareness in the target area, and may need to do some “selling” of the concept to get people on board;
- Then you need to scope the project to determine what time and resources are needed, and to determine how the results will be measured;
- You need to tailor a local MVP framework that will fit the working habits of the pilot team;
- You need to embed the knowledge management processes and activities into the process of the business, and
- Then you need to measure and deliver the results.

Step 3 is the one where most KM judgment needs to be brought to bear. The KM support role described below is responsible for this assessment, the crafting of the local knowledge management framework, and facilitation of the processes and technologies involved.

If the pilot project has been a success, then the exchange of knowledge will have led to a reduction in cost, a reduction in time, an increase in profitability, or some other business measure. This gives you a success story, which you can use for further marketing of the benefits of change throughout the organization. This story will be best received if it is told in the words of the business people involved. Ask the business manager, or one of the key players on the pilot project team, to define these benefits. If you can get a quote from them, or a video from them, this will be very powerful for you.

It may be quite difficult to isolate the contribution that knowledge management has made, but you should be able to make a statement such as “knowledge management helped to deliver a 20 percent cost saving, measured against previous costs for this activity”, or even “without the knowledge management activity, we would not have been able to deliver this 20 percent cost saving, measured against previous costs for this activity”.

[Contact Knoco](#) to help scope and plan your KM pilot.

The 3 key roles in a KM pilot

In order to ensure success, you need to set up 3 key roles, described below.

- The first role is that of the business sponsor, who acts as the customer for the project within the business. They play an active role in setting the direction, providing resources, and agreeing objectives and deliverables. The business sponsor is likely to be the manager of the business unit, and it is crucial that they be committed to the success of the project.
- The second role is that of the local pilot project manager. This person will be accountable for delivering the results of the project. It is important that this role is owned by somebody within the business, so that the project is seen as internal to the business, rather than something “which is being done to us by outside specialists”. The KM person should never be the pilot project manager.
- The third role is that of the knowledge management adviser or supporter, who works closely with the local project manager in implementing the project; providing the knowledge management tools and technologies and facilitating the KM processes. The knowledge management adviser will be a member of the KM implementation team, and provides learning from the pilot project back to the KM team. They may work full-time on the pilot project, depending on its complexity and scope.



Image from wikimedia commons

[Contact Knoco](#) to help define and train these roles.

News from Knoco

Some updates from across the Knoco family are listed here.

The ISO KM standard - status update

Work is now complete on the ISO Knowledge Management standard (ISO 30401). All of the comments received during the public consultation phase have been discussed, and the standard updated and reworked as a result. It is now with the ISO proof-readers and translators, and we expect it to be available some time around September.



The ISO working group in Paris, finalising the Knowledge Management Standard. Nick is on the far right.

The Knoco KM survey - now publically available

We have decided to open our KM Survey results to the public. We have written a report of the results from our 2014 and 2017 surveys which you can [order online](#). All we ask in return is to let us know who you are and what you will use the survey for. We spent a lot of time and effort on the survey, we are very proud of it, and we are very interested in how it will be used!

[Order the survey here.](#)

Knoco Chile

On June 29th, Javier will be taking part in Bilbao in the 15th international conference "[Developments in economic theory and policy](#)". He will speak at the Organized Session "Intellectual Capital: Persons, knowledge and innovation. Conceptual framework" an my conference will be named "Organizational capital: Why organizations struggle to learn and reuse knowledge"

Knoco Spain

On the 9th, 10th and 11th of may Joaquim and Javier participated in the [International EDO Congress](#). Both delivered presentations and together they delivered a Bird Island Workshop to about 40 attendees.



Delegates at the Knoco Bird Island exercise ran by Joaquim and Javier

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Knoco Ltd, 37 Portland Rd, Kilmarnock, KA1 2DJ, UK