# KNOWLEDGE MANAGEMENT

*Process Strategy & Goals FY18*

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## BACKGROUND

AcmeAuto Elevator's goal is to provide the highest quality services to its customers. As a team, the IT organization functions in many capacities in order to support that goal. The Service Management team's focus is to implement processes that enable the IT organization to better serve the business. Ultimately, the success of each team drives toward the overarching business goals and objectives of TKE.

The Knowledge Management process is designed to transform data and information into knowledge, and to make that knowledge accessible, digestible, and actionable. Through an organized structure that includes researching, gathering, sharing, and storing knowledge, our goal is to build a culture of knowledge seeking and sharing that results in a stronger and smarter IT team.

## BUSINESS CASE

The purpose of the Knowledge Management process is to share perspectives, ideas, experiences and information; to ensure that these are available in the right place at the right time to enable informed decisions, and to improve efficiency by reducing the need to rediscover knowledge (Axelos, ITIL 2011).

IT support exists to ensure continuous operation of systems with minimal interruptions and risks to business functions and services. In order to meet this objective, those in support roles must have access to knowledge that will allow them to provide fast and effective solutions. The higher goal of knowledge management is that knowledge seekers not only get one-time solutions to problems, but also deepen their understanding of a subject, thus reducing the need to seek out those answers again. This results in increased service efficiency and improved service delivery.

In addition to resources for support, Knowledge Management also supports the business continuity, regulatory compliance, and IT Controls that TKE must hold as high priority. The documentation of policies, processes and procedures ensures consistency in service delivery and allows IT team members to gain deeper understanding of functions across the organization.

By implementing a knowledge management process, the Service Management team can provide more robust tools for discovering knowledge, including a service knowledge management system (SKMS) that offers controlled access to data, information, process documentation and artifacts; a communication portal that opens knowledge sharing among cross-functional teams; and a comprehensive knowledge base of solutions and reference articles, all of which enable the goal of continuous improvement of IT support.

## CURRENT STATUS

The current IT organization is staffed with professionals in several critical areas. While each area offers a specific service, none exist in silos, all having certain dependencies on other services. An analysis of the current state of knowledge management revealed that a formal process has not previously existed, with only tacit knowledge (internal, subject matter expertise) being shared in isolated exchanges. The use of existing knowledge bases and document repositories has been lackluster, with no focused effort to drive engagement with the tool.

The Service Management team, in implementing the ServiceNow system and associated ITIL processes, has begun the process of building system-based tools for knowledge seeking and sharing. However, there is much work to be done. Currently, the ServiceNow knowledge base contains 83 published articles. When measured against the number of open incident and problem tickets, there is a great opportunity for knowledge sharing through Q&A and knowledge base content. Feedback on existing KB content has been very favorable, with an average rating of 4 on a satisfaction scale of 1 to 5 – however, there is very little feedback, as social functions within the knowledge bases have yet to be fully activated and socialized. This is an indication of how positive an impact a more robust knowledge base could have on the user audience.

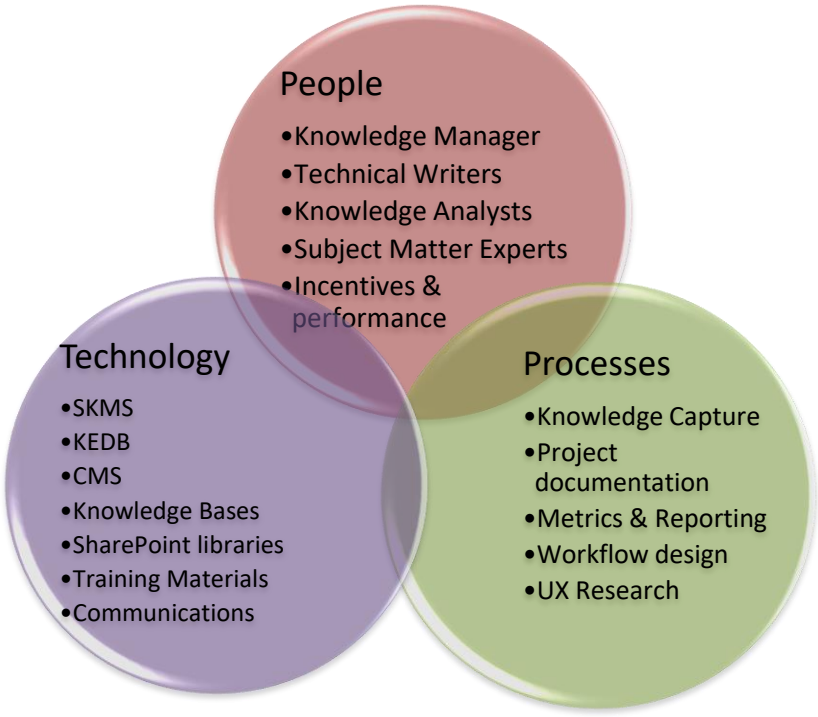
## MISSION, VISION & OBJECTIVES

The ITSM team's knowledge management philosophy is that "There is strength in sharing our greatest asset – knowledge". Our vision is to create a culture of knowledge sharing that will grow a better, faster, smarter IT organization.

As an IT Infrastructure Library (ITIL) process, the mission and objectives of Knowledge Management are:

- To build a culture of open knowledge seeking and sharing, for the strengthening of the IT organization
- To ensure IT team members understand the value that their knowledge brings to the organization
- To improve accessibility and availability of knowledge and information that helps to support management decision making
- To reduce time and effort required to support and maintain services
- To facilitate successful implementation and early life operation of new and changed services with few knowledge related errors
- To improve accessibility and management of standards and policies
- To reduce dependency on personnel for knowledge

These objectives will be met through leveraging our combination of People, Processes, and Technology:




## Roles & Capacity

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|---|---|
| **Process Owner** | Responsible for process design, overall goals, and continuous process improvement |
| **Process Manager** | Must ensure that process is functioning properly; ensures utility (ease of use); collects and reports performance metrics; collaborates with Process Owner on CSI initiatives |
| **Process Analyst** | Remains engaged with process tools and performance to identify issues and suggest areas for improvement |
| **Service Lead** | Manages capacity of Service Practitioners (Documentation Team) and sub-processes in support of Knowledge Management |
| **Service Provider** | Responsible for day-to-day work as assigned by Team Lead and/or Process Manager; Reports on any performance or functionality issues that impede performance. |
| **Practitioners** | All who engage the process, as users and service providers |

## Capacity Triggers

Each role has a capacity for the amount of work that can be accomplished, before it should be determined that additional resources may be needed (capacity triggers). Knowledge Management capacity triggers are as follows:

**Process Owner:** Process Owner may collaborate with Process Manager on design and CSI goals

**Process Manager:** Process Manager is responsible for function of KM team. Should capacity be reached, Service Team Lead may be engaged for larger project assignments

**Service Lead:** Expected to manage Practitioners capacity and assignments, as well as carry out Practitioner functions. Should Lead reach capacity, operational tasks may be assigned to Practitioners.

**Service Providers:** Expected to execute project and operational tasks as assigned. Should all Practitioners reach capacity, they should inform Team Lead, who will approach Process Owner and Manager, requesting additional support.

## DELIVERABLES

**Process Documentation** – The ITSM Documentation Team is responsible for documenting policies, processes, and procedures for each ITIL process area.

**Training** – Knowledge Management is responsible for training development for each process area including the training plan and specific deliverables (scripting, user materials, exercises, etc). Delivery method and deliverables are based on subject matter. Training development should be considered a separate effort from documentation.

**Communications** –The Documentation Team will develop communication plans and messaging for each process area as a component of the project. The team also creates and distributes ad-hoc messages (Technical Bulletins) upon request.

**Knowledge articles** – Knowledge Management is the owner of the ServiceNow Knowledge Bases, with the Documentation Team responsible for writing, editing, and publishing articles and content.

**Documentation services** – IT Organization teams can request services from the documentation team; the Team Lead will assess requests and assign a Technical Writer to the project.

**Sub projects** (Contests, engagement activities, etc) – Knowledge sharing is a behavior that must be encouraged in order to create a culture that embraces Knowledge Management. Incentives such as contests and performance reporting have proven successful in driving such culture changes. The Knowledge Management team will develop events that incentivize KM activity (Knowledge Base article requests, Sharing feedback, use of social forums in ServiceNow, Leader Boards, etc.)

## CRITICAL SUCCESS FACTORS & KEY PERFORMANCE INDICATORS - FY18

Critical Success Factors (CSFs) are the performance drivers for a process area; they represent the goals of Service Management that are aligned with the overarching business objectives.

Key Performance Indicators (KPIs) are the specific and measurable performance areas that determine if the process is working toward meeting the objectives identified in the CSFs.

For FY18, the Knowledge Management process CSFs and KPIs are as follows:

**CSF:** Reduced time and effort required to support and maintain services
**KPI:** Increased results on knowledge management satisfaction survey of service operations teams

**CSF:** Improved accessibility and management of standards and policies
**KPI:** Increased number of standards and policies stored in SKMS

**CSF:** Reduced dependency on personnel for knowledge
**KPI:** Increased percentage of SKMS (KB) searches that receive a rating of GOOD by the user

## KNOWLEDGE MANAGEMENT SMART GOALS – PHASE 1: LAUNCH

**SPECIFIC:** By December 1, launch a new Knowledge Management process for the IT organization in order of 1) Application Support Team, 2) Service Desk, 3) IT Organization, and 4) Business Users, introducing Knowledge bases, repository of documented policies and processes, and IT Documentation services.

**MEASURABLE:** By November 10, launch dashboards that report Knowledge Management metrics for each geographical region, to allow teams to measure performance and identify areas for improvement. Additional dashboards will be built as process areas are launched.

By January 8, launch Knowledge Management individual performance measurements for Service Management team, capturing activity related to knowledge article creation and quality of information (not writing quality).

By February 28, launch monthly User Experience Survey to measure performance and gather feedback on performance of Knowledge Management process from User perspective.

**ACHIEVABLE:** The KM team will research user experience, knowledge base usage trends, and best practices. The team will then organize knowledge bases in response to those findings; finally the KM process will go-live, offering upgraded content and documentation services for the IT organization.

**RESULTS FOCUSED:** The creation of a robust Knowledge Management process with Knowledge Centered Support driving the sharing culture will result in improved service performance, specifically improved service quality, decreased resolution time, and decreased need to rediscover knowledge.

**TIME BOUND:** The Knowledge Management process is expected to go-live with all deliverables and CSI activities, to see a well-functioning process by end of FY18.

## CONTINUOUS SERVICE IMPROVEMENT & PROCESS MATURITY

Continuous Service Improvement (CSI) is the final stage of the ITIL lifecycle, and a critical component of each process area. Reported Metrics help identify areas for improvement, but CSI activity should also include ongoing analysis of user experience, discovery of best practices, and development of ideas. The Knowledge Management Process Owner and Manager will collaborate on ideas for improvement. For FY18, the following CSI goals have been identified:

- Implementation of Knowledge Centered Support (KCS) into the Incident and Problem workflow, to drive knowledge sharing across the organization and transform knowledge into an asset
- Transformation of SharePoint from a document repository to a tool for communication and collaboration among local teams
- Introduction of social tools within ServiceNow to improve KPI data collection and to drive feedback and communication from the knowledge base audience
- Release of first monthly Service Management Review to IT Organization, providing information on Service Management activity and education on process areas

## Integration with Other Process Areas

Knowledge Management is the one ITIL process that integrates with all other processes, for a variety of reasons and in a variety of methods. As Knowledge Management follows the DIKW (Data>Information>Knowledge>Wisdom) model, its value is in its ability to support the continuous improvement goals of all other processes.