

Building A Knowledge Base

PMI-SVC Hwy 80 Forum

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Problem Identification and needed solution for:

- Lack of existing Tools, Templates, Standard documentation
- Reinventing the wheel
- Knowledge exists in silos
- Loss of expertise when key staff leave organization
- Risk of using new and untested processes, procedures, and templates
- Added costs to projects and impact on profitability



Proposed Solution:

- Integrate elements of Knowledge and Project Management
- Build a Knowledge Base that will be readily available and used throughout organization
- Create an atmosphere of cooperation, promoting innovation, and partnering for individual and group success.



What is Project Management?

- **Project Management (PM):**The application of knowledge, skills, tools, resources, and techniques to a broad range of activities to meet the requirements of the particular project.



What is Knowledge Management?

- **Knowledge Management (KM)** is the process of locating, capturing, organizing, refining, and sharing information for the benefit of an organization.
- Taking this one step further, KM is a process for optimizing the effective application of organizational assets and intellectual capital to achieve desired goals and objectives.



Let's Merge KM and PM

- **KPM** is the application of knowledge, skills, tools, resources, and techniques in an effort to build (1) a culture and (2) knowledge base that will support an organization's programs, projects, and best practices.



Knowledge Management Focus

- People who create and use knowledge.
- Processes and technologies by which knowledge is created, maintained and accessed.

Sources: Petrides, L.A. & Nodine, T.R (2003). Knowledge management in education: Defining the landscape. Edvinsson, L. & Malone, M.S. (1997). *Intellectual capital: Realizing your company's true value by finding its hidden brainpower*. Ford, N. (1989). From information- to knowledge-management. *Journal of Information Science Principles & Practice*.

Explicit vs Implicit Knowledge

<p><i>Explicit knowledge:</i> Documented information</p>	<p><i>Implicit knowledge (Tacit):</i> Knowledge embedded within people</p>
<ul style="list-style-type: none">• Formal or codified• Documents: Plans, reports, policy manuals, white papers, standard procedures• Books, magazines, journals (library)	<ul style="list-style-type: none">• Informal and uncoded• Knowledge in heads• Memories of staff and vendors

Sources: Polanyi, M. (1967). *The tacit dimension*. Leonard, D. & Sensiper, S. (1998). The Role of Tacit Knowledge in Group Innovation. *California Management Review*.



Knowledge Assets

- **KPM** includes information assets, such documents, (PM) plans policies, and procedures, as well as previously unarticulated expertise and experience held by individuals.



Components of KPM

- **Governance** – Approval and oversight
- **Ownership** – Typically the Project Management Office
- **People** – Project Managers, Project Teams, Communities of Practice
- **Processes** – Knowledge enabled
- **Library** – Collection of artifacts, stored in SharePoint or network drives
- **Content** – Standard templates, based on best practices, internal and external intelligence



KPM Lifecycle

- Discovery or create
- Validate and approve
- Store in repository
- Adapt file naming convention
- Adapt look and feel (standardization)
- Share
- Adapt and apply



Discovery and KPM Audit

- Where does KM information exist?
- Systematic investigation and evaluation of an organizations explicit and tacit knowledge resources, information and knowledge entities and assets, in order to determine how efficiently and effectively they are used and leveraged by the organization.



Obstacles to KPM

- Staff “buy-in” and relinquishing knowledge (and job security)
- Defining and achieving the goals of KM
- Lack of resources: People, Funding, Technology
- This is a heavy lift if scope is not controlled



KPM Team Formation

- Governance Committee
- Project Management Office
- Librarian
- Contributors
- Reviewers



Repository of KPM

- Build Taxonomy for storage of documents
- Implement a file naming convention
- Lock source documents
- Publish and share documents



Examples of KPM Repositories

- **CA Dept of Technology**
 - <http://capmf.cio.ca.gov/Templates.html>
- **CA Dept of System Integration**
 - <http://www.bestpractices.ca.gov/sysacq/documents.shtml>



KPM Roadmap

- Organization and setup
- Establish scope and goals
- Allocate resources (people, funding)
- Analysis, Design, Development
- Knowledge Audit
- Build the repository
- Deploy
- Review, Refine, Monitor KPM Health
- Lessons Learned



KPM Implementation Hints

- Start small
- Pilot with selective and prioritized set of documents
- Conduct interim Lessons Learned
- Continue building repository
- Include review of KPM team and Roles/Responsibilities



Questions?



Thank you!

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File Naming Convention

- Create segments
- Use abbreviations
- Use “draft” and “final”
- Use date or version number



Look and Feel

- Create standardized templates
- Colors and Logos
- Sections
- Font, Spacing Rules