

## Developing an Enterprise KM Competency Model

You are the CEO of a large multinational organization. Implementing an enterprise-wide knowledge management initiative has long been on your management agenda, but never a priority. Given the dire economic times, the need to become more efficient, effective, competitive, and innovative motivates you and your Directors to execute a KM strategy as quickly as possible. How do you go about accomplishing such a task? Hiring a Chief Knowledge Officer is first on your list, but how do you know the person hired has the competencies necessary to succeed? What skills, expertise, and capabilities are needed to transform the organization to a knowledge-sharing culture that will ultimately enhance organizational performance? What will the organization need to know in order for KM to proliferate throughout the enterprise? What competencies must be demonstrated by KM professionals and learned by KM practitioners in order for KM to be adopted and used?

The U.S. Army is now tackling these issues. The Secretary of the Army and Army Chief of Staff signed a memorandum titled Army Knowledge Management Principles (<http://www.army.mil/ciog6/docs/AKMPrinciples.pdf>) on July 23, 2008. The memorandum clearly states that KM principles have implications for all Commands and Army organizations. All soldiers (including National Guard, reserve, and civilians) will now have to understand KM competencies and how to apply them. The first of the 12 Army KM principles is to train and educate KM leaders, managers, and champions, but on what body of knowledge do you base KM training and education?

Research the KM professional literature and you will find volumes of information on KM concepts and theories, KM approaches and methodologies, KM tools and resources, KM case studies, KM best practices, and even KM tips and tricks. All good stuff, but what is missing is definitive KM competencies; those subject areas critical to an organization's adoption and use of KM principles and practices. What is evident is that most KM competencies are also "knowledge work" competencies. In today's Army, as is true in virtually all labor categories in work forces around the world, most work today is knowledge work. As such, KM competencies must be considered core work competencies that knowledge-sharing organizations embrace and instill throughout their workforce. Additionally, a culture of trust and willingness to share must accompany these competencies. Knowing what to do and how to do it is only half the solution. Individuals must be willing to learn and share on a personal basis, and the organization must support individuals' abilities and attitudes with a cultural atmosphere that encourages knowledge sharing. To some extent these attitudes are in contrast to the Army mind-set (a mind-set which can be found in many commercial organizations as well) where a strict chain-of-command hierarchy can stifle knowledge sharing, so allowances must be made in situations

### **Army KM Principles**

#### **People/Culture**

1. Train and educate KM leaders, managers, and champions.
2. Reward knowledge sharing and make knowledge management career rewarding.
3. Establish a doctrine of collaboration.
4. Use every interaction whether face-to-face to virtual as an opportunity to acquire and share knowledge.
5. Prevent knowledge loss.

#### **Process**

6. Protect and secure information and knowledge assets.
7. Embed knowledge assets in standard business processes and provides access to those who need to know.
8. Use legal and standard business rules and processes across the enterprise.

#### **Technology**

9. Use standardized collaborative tool sets.
10. Use Open Architectures to permit access and searching across boundaries.
11. Use a robust search capability to access contextual knowledge and store content for discovery.
12. Use portals that permit single sign-on and authentication across the global enterprise including partners.

where the need to share supersedes strict discipline and adherence to protocol. If an organization is serious about implementing KM throughout the enterprise, and KM is to be woven into the organizational DNA, then there must be a body of knowledge, or a baseline understanding of KM principles and the accompanying cultural shift for there to be widespread and effective adoption and use.

The U.S. Army is currently developing a KM Competency Model. It will serve as the foundational body of knowledge for all Army KM training and education. These competencies apply to both KM professionals (those that serve in some KM leadership or stewardship capacity) and KM practitioners (all active, reserve, National Guard, and civilian personnel). The competency model imparts a common understanding of the essential skills and knowledge necessary to effectively promote proven KM practices. It provides a basis for professional development, and is intended to guide future training and curriculum development efforts. It is not expected that an individual will have to be an expert in all of the competencies in order to effectively adopt and use KM. The depth and breadth of competency depends on where an individual is in their career, their duties and responsibilities, and their domain (KM professional or KM practitioner). The competencies will be disseminated through Professional Military Education (PME) and the Army Civilian Training, Education, and Development System (ACTEDS), as these systems can help change the Army culture by infusing the competencies within professional training and education from accession through retirement.

What are the competencies and how did they evolve? In the spring of 2008 Dr. Robert Neilson, Knowledge Management Advisor to the Army's Chief Information Officer, Army CIO/G-6, introduced the notion of Army KM Competencies in a briefing titled Army Knowledge Strong; Army Wide Knowledge Management Community of Practice. These competencies have since been included in The Army CIO/G-6 Human Capital Strategic Plan for 2008-2015. These eight competencies introduced the breadth of subject matter needed to develop an Army KM educational program. It clearly illustrates that people, process and technology components are equally important, and that a base level of KM foundational education is necessary across the enterprise to assure KM adoption and use. The model boldly moved KM beyond IT by calling attention to the organizational, cultural, and relationship aspects of KM competencies, and included the elements of assessment and measurement to underscore the notion that what gets measured gets done. Though these concepts are basic KM fundamentals, they have never before been codified within the Army as the essential elements of Army KM education and curriculum development. Additionally, they directly relate to the Army KM Principles by furnishing the competencies needed to make the principles actionable.



Figure 1, Dr. Neilson's Army KM Competencies

The model is now being vetted throughout the Army KM professional community as well as external governmental and commercial entities. It is being modified and enhanced as feedback is collected and synthesized, with the goal of improving the model and gaining consensus on its adoption and use. Currently there are nine general competency areas in respect to Army KM, as shown in Figure

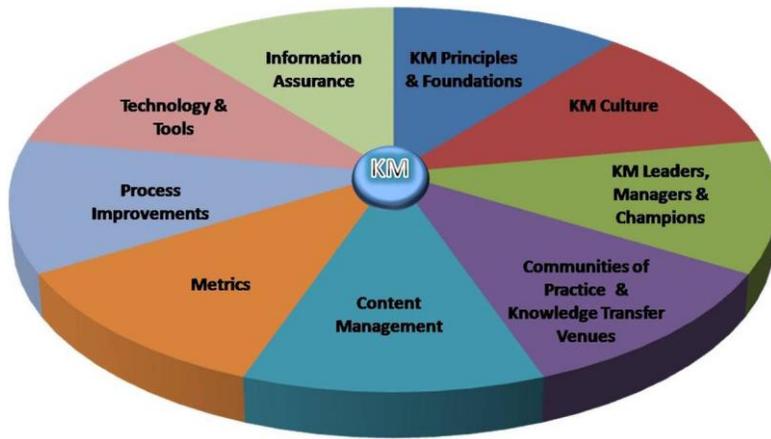


Figure 2, Army KM Competencies Feb 09

2. These competency areas must be well covered to create a culture of collaboration and knowledge sharing in the Army.

The Army KM Competency Model is much more than just these nine competency area subject headings. Behind each competency area are goals that characterize the desired outcome, suggested actionable approaches to meeting the goals intent, and suggested

methods to enable the approach. Figure 3, shows the competency area goal, approaches, and suggested methods. These goals, approaches and methods will then be used by the U.S. Army Training and Doctrine Command (TRADOC) and other Army organizations to design core KM training and educational strategy that will ultimately lead to curriculum development delivered by the Professional Military Education and Army Civilian Training, Education, and Development Systems.

The U.S. Army is serious about KM and believes that efforts must be grounded in enduring principles and sound competencies. Ultimately the Army will endorse a KM Competency Model that will

serve as the foundation for enterprise-wide KM adoption and use, and create a culture of collaboration and knowledge sharing in the Army where personalized and contextual information and knowledge is “pushed and pulled” from across the enterprise to meet mission objectives, where good ideas are valued regardless of the source, where knowledge sharing is recognized and rewarded, and where the knowledge base is accessible without technological or structural barriers.

Key Points

- The U.S. Army is treating KM as a professional discipline; hence it is developing a competency model.
- KM competencies are *knowledge work* competencies.
- A KM competency model reflects the strategy, goals, and objectives of the organization.
- Competency alone is not sufficient; it must be accompanied by an organizational culture shift towards knowledge-sharing.
- A rigorous vetting process provided consensus on core competency areas, as well as establishes the role of the CKO.
- This methodology applies to any modern organization, regardless if a CKO role is established or not. It can be used by any department or individual who has the vision, leadership, and determination to infuse KM principles in the enterprise.
- A KM competency model serves as the foundation for functions such as training, education, development, and performance management because it specifies what essential knowledge, skills, and abilities are required for success.

By: Art Schlussel, CKM®, CDIA, ECMs  
 Knowledge Management Consultant  
 U.S. Army War College  
 Center for Strategic Leadership  
 605 Wright Ave  
 Carlisle, PA 17013  
 717-245-3836 (office)  
 240-529-4209 (cell)  
[art.schlussel@us.army.mil](mailto:art.schlussel@us.army.mil)  
[artschlussel@gmail.com](mailto:artschlussel@gmail.com)

Figure 3, U.S. Army Competency Model Detail

Competency Area	Goal	Suggested Approaches in Action	Suggested Methods
<b>KM Principles &amp; Foundations</b>	Understand KM principles, theories, methodologies, and use	<ul style="list-style-type: none"> <li>• Develop formal KM training for both KM practitioners and professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Mandatory standardized KM courses taught in classroom and available online</li> </ul>
		<ul style="list-style-type: none"> <li>• Develop KM training self-study tools</li> </ul>	<ul style="list-style-type: none"> <li>• Non-mandatory standardized KM courses available online</li> </ul>
		<ul style="list-style-type: none"> <li>• Communicate KM awareness through Enterprise-wide and local events</li> <li>• Practice KM by developing knowledge-enabled work that incorporates KM practices into everyday activities</li> </ul>	<ul style="list-style-type: none"> <li>• Local targeted KM awareness events and outreach planned by KM champions</li> <li>• Embed knowledge and learning processes into basic work processes, standard operating procedures, and project management methodology</li> </ul>
<b>KM Culture</b>	Understand KM cultural issues that impact the adoption and use of KM practices	<ul style="list-style-type: none"> <li>• Establish KM governance structures and link them to organizational objectives and strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Creation of KM Executive Councils, and development of knowledge and information management policies</li> </ul>
		<ul style="list-style-type: none"> <li>• Establish a “learning culture” to ensure proper reflection of lessons learned occur at key stages during and activity, project, or work cycle</li> </ul>	<ul style="list-style-type: none"> <li>• Techniques such as Before Action Reviews, and Retrospects are instilled into the culture</li> </ul>
		<ul style="list-style-type: none"> <li>• Create a structured change management program to monitor KM enablers and detractors</li> <li>• Reward and recognize knowledge sharing and collaboration to motivate staff to contribute</li> </ul>	<ul style="list-style-type: none"> <li>• Establish clear objectives and milestones, gain leadership support, create effective metrics, and provide positive reinforcement</li> <li>• Include KM activity in the performance review process, recognize contributions through communications channels, define KM accountabilities for individuals, teams, and the Enterprise</li> </ul>

Competency Area	Goal	Suggested Approaches in Action	Suggested Methods
<b>KM Leaders, Managers, &amp; Champions</b>	Understand what KM professionals do, their roles and responsibilities, and how they influence the use of KM practices within an organization	<ul style="list-style-type: none"> <li>Seek out KM champions throughout the organization to support KM activities</li> </ul>	<ul style="list-style-type: none"> <li>KM champions act as liaisons between the KM professionals and practitioners, are KM advocates and role models, are facilitators for KM techniques, and are project managers for KM efforts</li> </ul>
		<ul style="list-style-type: none"> <li>Develop specific KM expertise within the organization</li> </ul>	<ul style="list-style-type: none"> <li>Create a CKO and/or KMO position, explore the need to create a KA (Knowledge Architect) position, develop CoP leaders and facilitators</li> </ul>
<b>CoPs &amp; Knowledge Transfer Venues</b>	Understand the KM approaches to knowledge sharing, transfer, and collaboration	<ul style="list-style-type: none"> <li>Encourage the establishment of Communities of Practice around professional activities</li> </ul>	<ul style="list-style-type: none"> <li>Provide the resources to allow CoP activities to emerge and grow throughout the organization and encourage participation; CoPs provide a forum to share expertise and build a body of knowledge</li> </ul>
		<ul style="list-style-type: none"> <li>Encourage the establishment of Communities of Interest around non-professional activities</li> </ul>	<ul style="list-style-type: none"> <li>Provide the resources to allow COI activities to emerge and grow throughout the organization; as people interact and network they will build trust and relationships that cross departmental boundaries</li> </ul>
		<ul style="list-style-type: none"> <li>Establish policies and practices to best use your Subject Matter Expert resources</li> </ul>	<ul style="list-style-type: none"> <li>SME activities could include CoP facilitation, mentoring and coaching, internal consulting, and expertise transfer techniques</li> </ul>
<b>Content Management</b>	Understand content-lifecycle management, content library structures, content labeling and tagging, and search as it pertains to KM practices	<ul style="list-style-type: none"> <li>Leverage the abundant knowledge –sharing, capture, and collaboration opportunities found within team, workgroup, and other small group activities that occur naturally during the work day</li> </ul>	<ul style="list-style-type: none"> <li>Capture key points from meetings and make them available to the larger audience; post findings on related forums and solicit feedback and input; push information to others who may benefit from your knowledge work creation</li> </ul>
		<ul style="list-style-type: none"> <li>Review current content management procedures to ensure compliance with formal policies and guidance; ensure all content is credible (has authoritative source, has contextual consistency, is actively managed)</li> </ul>	<ul style="list-style-type: none"> <li>Assess how documents are created, stored, accessed and archived; audit records to ensure compliance with formal record-keeping requirements; develop plan for addressing discrepancies and poor practices</li> </ul>

Competency Area	Goal	Suggested Approaches in Action	Suggested Methods
		<ul style="list-style-type: none"> <li>• Develop a consistent organizational approach to metadata along with the structure and guidelines to enforce metadata tagging</li> </ul>	<ul style="list-style-type: none"> <li>• Create metadata elements that will enhance the retrieval of content across the organization; look at both manual and automated methods of metadata creation; explore methods to provide social tagging to content to supplement controlled terms</li> </ul>
<b>Metrics</b>	Understand the reasons for monitoring and evaluating performance, considerations of what to measure, and using metrics to refine KM strategies	<ul style="list-style-type: none"> <li>• Use metrics to assess the accomplishment of organizational strategic goals and objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Measurement against strategic goals and objectives provides insight on how KM efforts are closing the knowledge gap between what your organization knows and what it needs to know to be successful</li> </ul>
		<ul style="list-style-type: none"> <li>• Use metrics to measure efficiency (output – activity based) and effectiveness (outcome – results based)</li> </ul>	<ul style="list-style-type: none"> <li>• Use a combination of both output and outcome metrics to track both hard (factual) and soft (perceptual) measures</li> </ul>
		<ul style="list-style-type: none"> <li>• Standardize measures across the organization to ensure they are focused on strategic outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Focus organizational metrics on strategic goals and accomplishing the mission; ensure alignment across all departments</li> </ul>
		<ul style="list-style-type: none"> <li>• Measure only what is necessary to drive the intended results</li> </ul>	<ul style="list-style-type: none"> <li>• When measuring for outcomes it is best to manage no more than five to seven measurements; the results should drive decisions that refine KM strategy</li> </ul>
<b>Process Improvements</b>	Understand the use of KM techniques in order to find opportunities for simplifying current processes or making them more efficient or effective	<ul style="list-style-type: none"> <li>• Use KM techniques to simplify or increase the efficiency or effectiveness of current business processes</li> </ul>	<ul style="list-style-type: none"> <li>• Assess current processes that may be streamlined or eliminated; understand why the process steps must be performed as is to achieve the desired result</li> </ul>
		<ul style="list-style-type: none"> <li>• Create process maps and conduct knowledge audits to identify where critical information and knowledge inputs and outputs are</li> </ul>	<ul style="list-style-type: none"> <li>• Process maps used in conjunction with knowledge maps can drive process redesign projects that help define the most appropriate roles and responsibilities for information and knowledge management, tightly integrated into the operational workflow</li> </ul>

Competency Area	Goal	Suggested Approaches in Action	Suggested Methods
		<ul style="list-style-type: none"> <li>Integrate KM with Six Sigma efforts to ensure sustainability to process improvement, and help focus KM on outcomes and impact of business processes</li> </ul>	<ul style="list-style-type: none"> <li>Use CoPs or other knowledge transfer venues to facilitate initial process redesigns and continuing improvement and lessons learned; from a metrics development perspective, Six Sigma focuses strongly on outcomes and tangible evidence of impact on the business</li> </ul>
<b>Technology &amp; Tools</b>	Understand how technology impacts KM, and the tools that are available to facilitate knowledge sharing and collaboration	<ul style="list-style-type: none"> <li>Ensure the organization Information Architecture (IA) fits the needs of its primary user groups be it for a single platform such as an Intranet or knowledge portal, or across several platforms</li> </ul>	<ul style="list-style-type: none"> <li>An IA will make sense of how the different platforms relate to each other, how users will navigate between them, and how expectations for content discovery (search) can be met</li> </ul>
		<ul style="list-style-type: none"> <li>Assess how the organization currently uses technology to accomplish tasks such as content creation, capture, review, sharing, collaborating, and archiving</li> <li>Stay abreast of current and emerging technologies and how they can be (or are being unofficially) used within your organization</li> </ul>	<ul style="list-style-type: none"> <li>Develop a list of tools that are used by the organization to connect people to explicit knowledge and tacit knowledge – these include everything from email, phone books, and meetings to Web 2.0 technologies such as Blogs, Wikis, and Podcasts; map how these technologies work within the IA and how they help the organization meet its strategic goals and objectives – use this information to guide KM strategy</li> <li>Leverage the knowledge within the organization by seeking input through a variety of KM methods to gain understanding of the technologies people use within and outside the organization</li> </ul>
<b>Information Assurance</b>	Understand balancing the need to know with the need to share, and how KM coexists with information management policy	<ul style="list-style-type: none"> <li>Accept that KM and information assurance must coexist, and that secure knowledge management takes into account the aspects of confidentiality, trust and privacy management</li> </ul>	<ul style="list-style-type: none"> <li>Understand that secure KM is much more than protecting classified information; security strategies, secure operations processes, and security metrics need to be incorporated into KM strategy and plans</li> </ul>

Competency Area	Goal	Suggested Approaches in Action	Suggested Methods
		<ul style="list-style-type: none"> <li>• Balance the need to know with the need to share</li> </ul>	<ul style="list-style-type: none"> <li>• Organizational assets such as intellectual property, trade secrets and privacy information need to be protected from malicious or unintentional access and use; ensure technology incorporates access controls, credential mechanisms and encryption systems to secure KM practices</li> </ul>
		<ul style="list-style-type: none"> <li>• Develop security strategies, policies, plans and procedures that not only address information management but consider KM strategies, and is tightly integrated with business strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Review existing information management policies; consider supplemental policies that incorporate security controls into the KM lifecycle while maintaining appropriate access to knowledge</li> </ul>