



# From KM Pilot to Launch

Twelve Things You Need to Think About  
November 2005

Stacy Land  
Sr. Knowledge Manager  
Zyman Group LLC  
stacy.land@zyman.com

This report is solely for the use of client personnel. No part of it may be circulated, quoted, or reproduced for distribution outside the client organization, or used outside the original intended scope, without prior written approval from Zyman Group. This material may have been used by Zyman Group during an oral presentation; it is not a complete record of the discussion.

# Today's Topics

- You're Moving Full Steam Ahead
- The Challenge: It's Up to You to Engage First
- Recognizing Cultural Disconnects
- The Twelve Things You Need to Think About

1

Committees,  
Committees,  
Committees

2

IT: Get Them  
in Your Court  
Early

3

Change  
Control

4

Help Desk  
and Support

5

Compliance

6

Engaging the  
Competition

7

Who is in  
Your Court?

8

Budgets and  
Processes

9

Procurement

10

ROI Standards:  
Yours and  
Theirs

11

Getting to the  
Red Carpet

12

Where Do  
You Go From  
Here?

# You're Moving Full Steam Ahead

- Understanding what brought you to this point and what changed is key to locating “speedbumps”
  - You've successfully conducted a pilot, prototyped a solution, gotten people interested in your KM project. You've gained momentum.
  - You've gotten an executive nod and money to go along with it
  - You've persuaded a work area or group to adopt or participate in your solution
  - Your solution has been identified as a “strategic imperative” (insert other buzz words here)

## Participants

- You've moving ahead with larger numbers of participants than before

## Standards

- Your solution is becoming a corporate standard

## Shared Responsibility

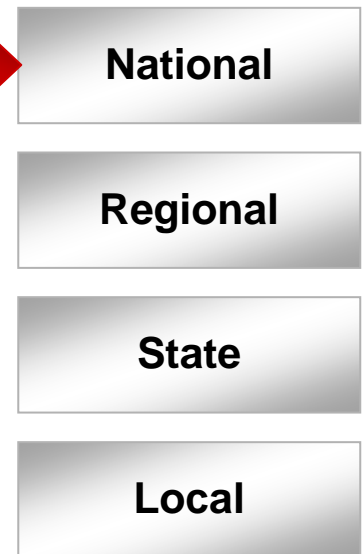
- You and your staff won't be able to handle every phase of the work ahead; suddenly you'll be relying on other to help you succeed

## Scope

- You've expanded beyond a single workgroup /office / state/ region to encompass others – or all

# The Challenge: It's Up to You to Engage First

- Locating and engaging the “sign off-ers” in your company as early as possible helps minimize bumps...or avoid the complete shut down of your efforts.
- In some organizations there are literally dozens of entities that have to “sign off” on your project before you can move forward
- Keep in mind:
  - What is true at one level may not be true for others
  - How things happened in your last job or before that merger or reorganization may be completely irrelevant
  - The sign-off you had to pilot may not carry any weight in moving further
  - A solution that was fine to pilot may raise compliance cautions if it is considered as a standard



# The Challenge: It's Up to You to Engage First (CONT)

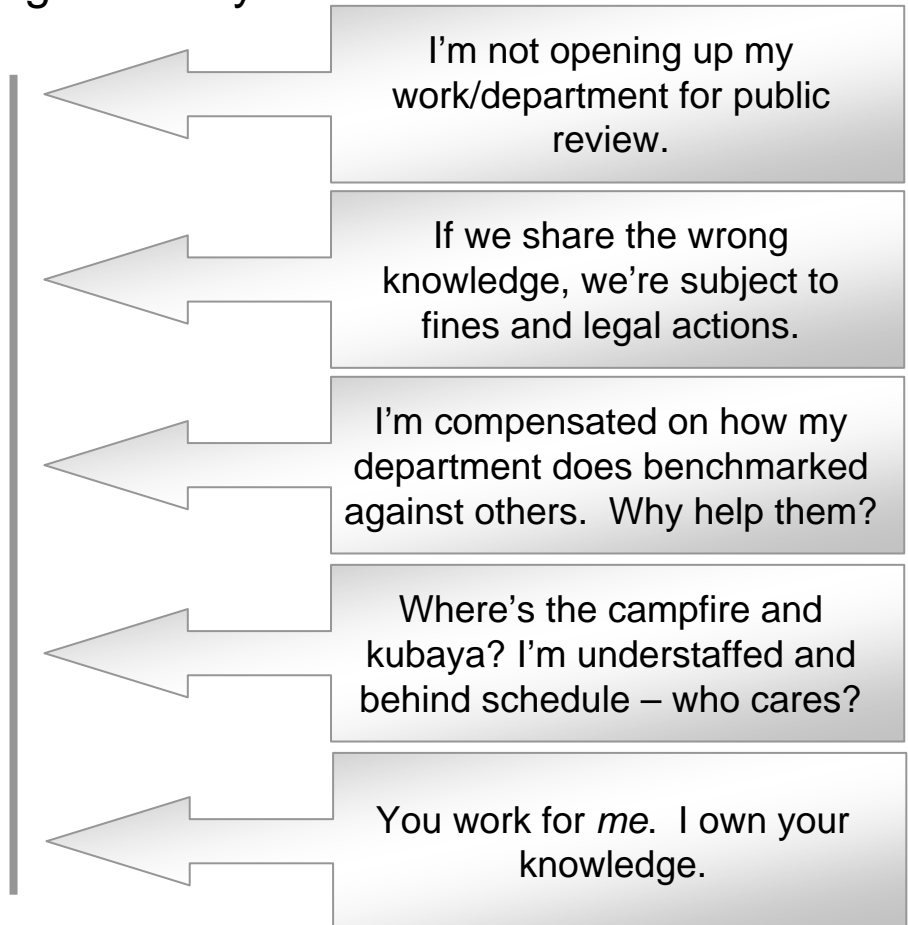
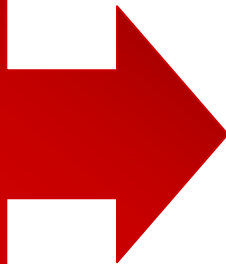
- If you're waiting for someone to identify every entity for you and put the sign-off in motion? Flip that. You need to control the dialogue, perception and processing of your efforts as much as possible.



# Recognizing Cultural Disconnects

- Be aware that there may be cultural/perceptual disconnects between you, as a Knowledge Management practitioner/evangelist, and members of these entities
- Most are classic KM challenges; it matters to you because you'll need to rely on and/or engage people who may not agree with you

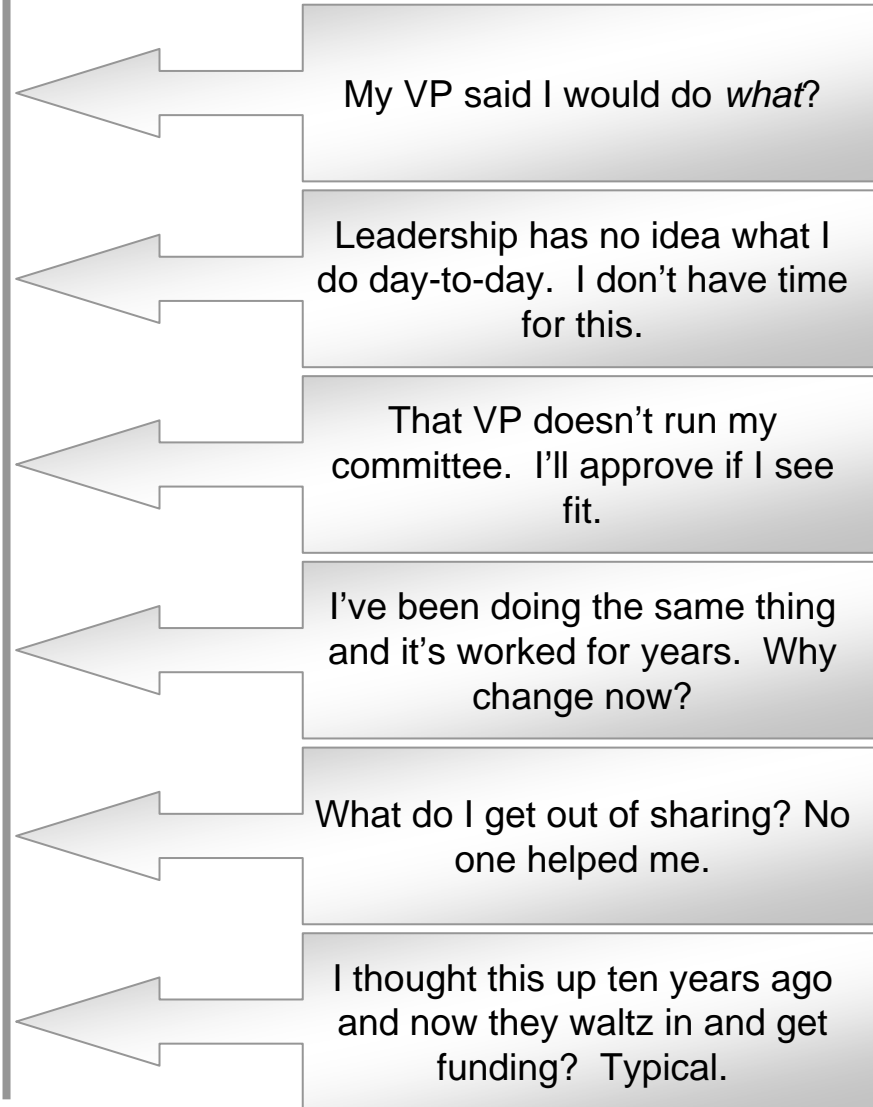
**The benefit from sharing knowledge is obvious – and knowledge belongs to the people who create it.**



# Recognizing Cultural Disconnects (CONT)

**I'm thrilled to have this new division joining the project! The VP is excited about the benefits it will bring his division and has promised everyone's cooperation.**

...and so on.



# **The Twelve Things You Need to Think About**

# Committees, Committees, Committees

- Identifying and prioritizing the committees you will have to win over is necessary for your project's success

Questions to Ask	
<b>IT</b>	Does your project have even a small IT component? Look for standards and security.
<b>Local, State, Regional, Enterprise</b>	Is your solution particular to a city, state, region? Often each level has its own governance.
<b>PMO</b>	Does your organization have an established PMO? If so, they are probably stakeholders.
<b>Ongoing Initiatives</b>	Has your organization been hit hard by HIPAA? Sarbanes Oxley? Is there any intersection?

Action Items	
<b>Develop Informants</b>	As you identify key players, befriend as many of their administrative support staff as you can
<b>Gather Meeting and Approval Schedules</b>	When do committees meet and vote? What is the lag time? You need to know.
<b>Who Are They?</b>	Get committee member names and figure out how they report in your organization
<b>Involve Legal</b>	If your organization has a legal department, they may be frequent committee members. Find out.

- **You should identify discrete areas inside IT and become well-versed enough to engage with them as needed.**
- **Becoming well-versed:**
  - **Your company standards:** some are easy to figure out (i.e., don't buy Mac software if you use PCs) but there are probably other standards behind the scenes that you need to know including hardware, and platform/OS
  - **Um, standards?** Not sure what those are? Nose around and find out!
  - **Why you care:** you'll need this information for two reasons:
    - So that you understand what the heck they're saying
    - To convince them that you understand what the heck they're saying
    - To ensure that you don't bring potential solutions to the table that are so far out of your company's standards that you lose IT as an ally or your credibility

# IT: Get Them in Your Court Early (CONT)

## Perception

- How is your project regarded? Fabulous, groundbreaking, pie in the sky? “When it fails, IT will get blamed?” A “nice to have”, but resource drain? Challenger to current standards?

## Operations

- How compartmentalized is your IT department? Do the same people buy hardware, install the operating system, install software, do custom coding, push out to end users?

## SLAs (service level agreements)

- Nail down IT SLAs because those SLAs impact *your* customers. If a server recover SLA is 2 hours, your customers need to know that, because they’ll look to *you* not IT.

## Security

- Are there special security considerations around your solution? Nearly anything that involves the Internet will be under increased scrutiny. Involve the security group early.

## “Skunkworks” Competition

- Are you competing with a homegrown solution? If so, was it grown in IT?

## Outside Help

- Although getting outside help may bridge some gaps, you will still have to have IT’s cooperation.

- Change control committees often hold the “keys” to the castle; process-wise, things *can't* happen until they sign off. Engage them early and be prepared to learn their lingo.
- Change control hides all over the place at big companies
  - Anything systems-related
  - Quality groups
  - Process groups, sometimes PMOs
- Don't be surprised if you have obligations to more than one change control committee
  - Remember the office, local, regional issue? They all potentially have separate change control entities
- You'll potentially need to deal with them on several fronts:
  - If anything has to be installed on people's computers (hardware/software)
  - If anything existing has to be changed/upgraded
  - Often, if anything new is happening at all

- Engaging the Help Desk may be one of the biggest success factors in turning your pilot into a permanent part of your company's landscape
- Your company's help desk may be part of IT, or not

**Do they know this is coming?**



- They will need to plan the support they'll offer you; engage them early

**Are they trained?**



- Do they know how to support your solution? Take the lead in ensuring that they know what they need to inside and out.

**Who does what?**



- Are you dividing up any aspects of support? Will you be using a tracking application?

**SLAs**



- What SLAs are in place for your help desk? 24X7 support? Business hours only?

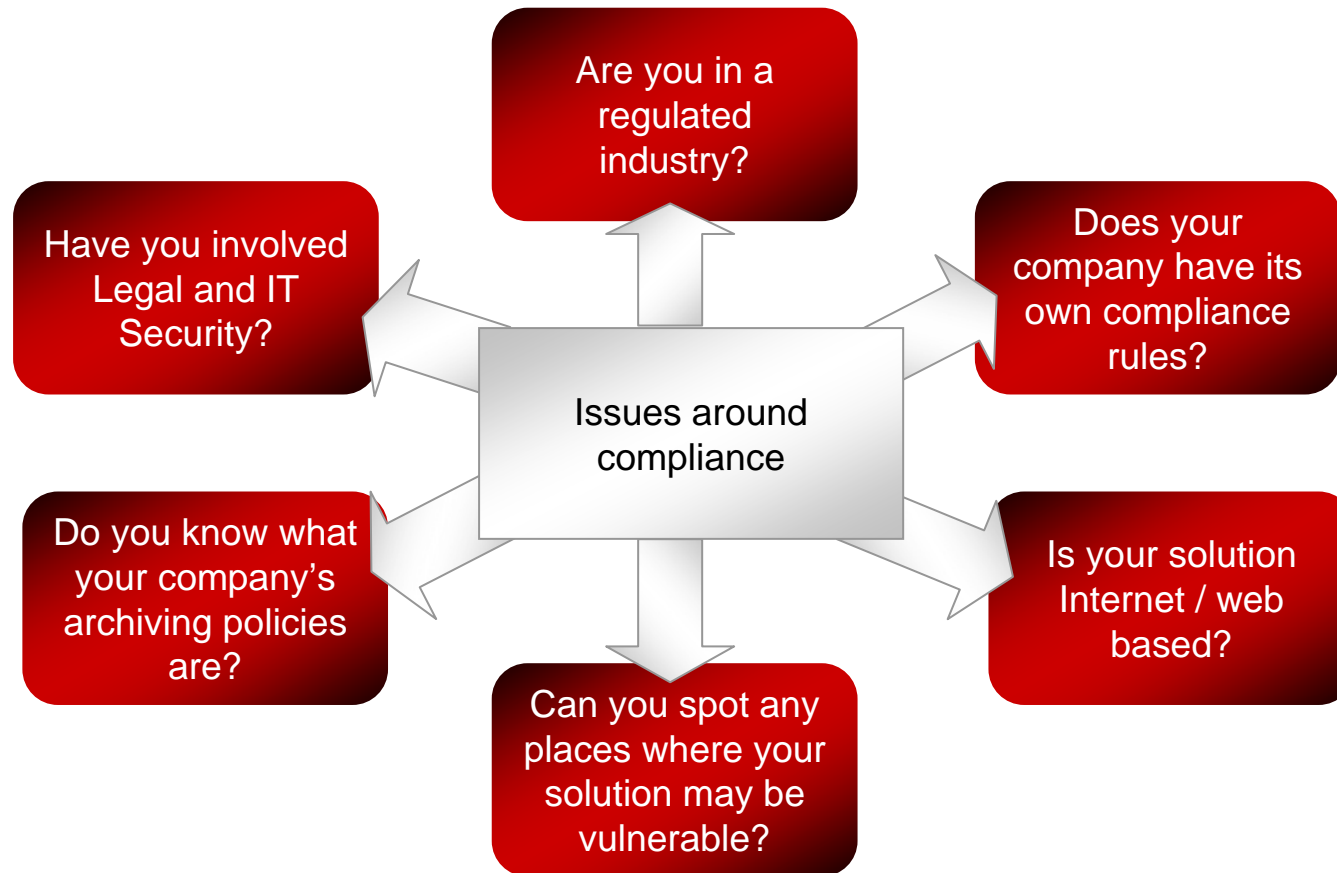
**Multiple Tier Support**



- What tiers are involved in supporting your work? You'll probably need more than Tier 1; investigate and nail down the answer.

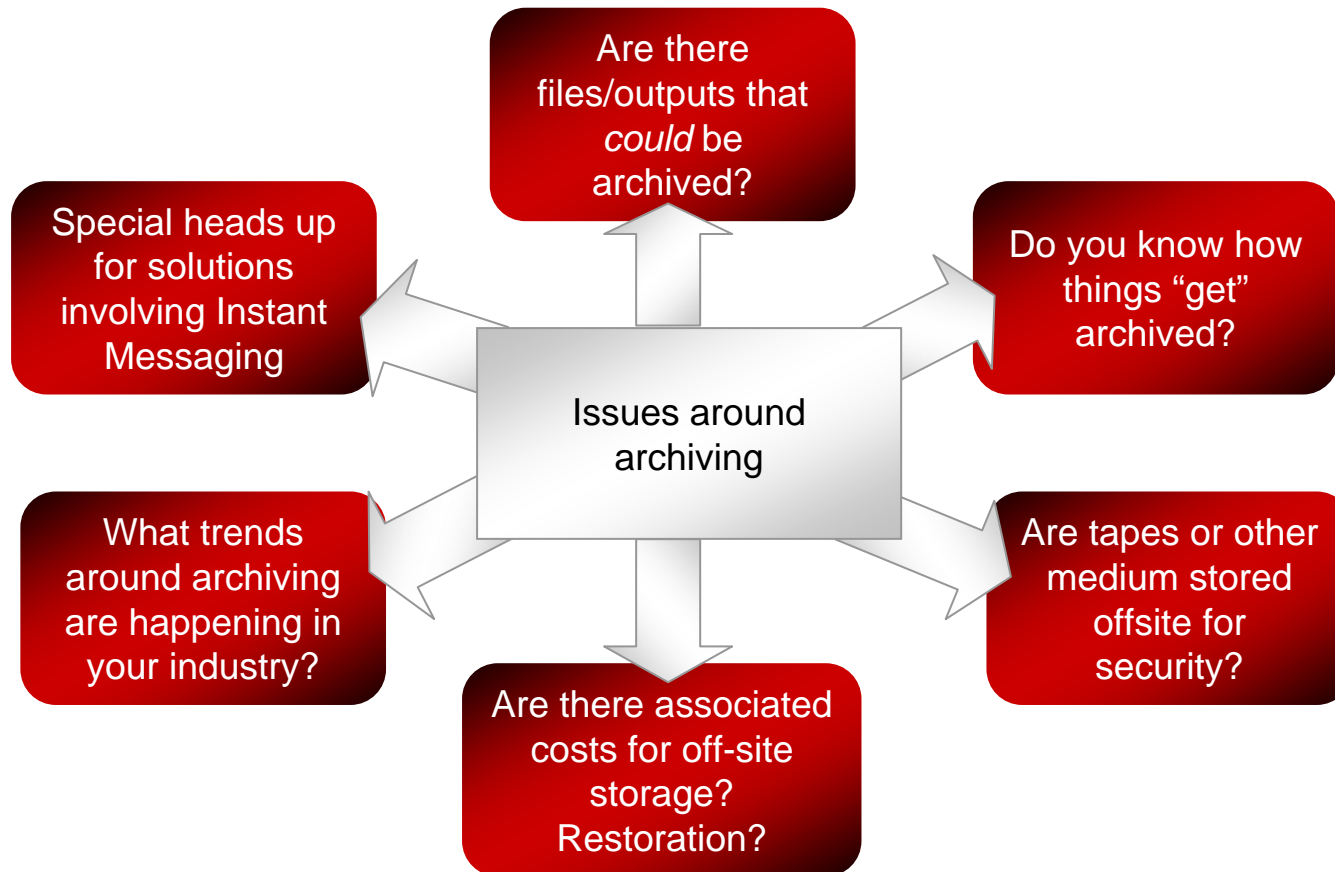
# Compliance: Asking the Right Questions to Make Sure You Are

- There's no room for debate on non-compliant solutions – so make sure yours is.



# Compliance: Archiving Deserves Special Consideration

- Archiving deserves special consideration, because it may involve costs you're expected to budget for.



- Recognize that competition is alive and well in the workplace and protect yourself.
- Competition? But wait – aren't we all on the same team here?
- What are you competing for?
  - Funds and associated hardware, software, headcount
  - The spotlight – is anyone afraid you're going to steal their thunder?
  - Tool bias
- Conflicts and responses:

## Funding conflicts



- Support your arguments with as much data as possible; engage every level of management with influence upwards; understand the process

## Spotlight conflicts



- Try to understand the history of the competing initiative and their motivation. Engage them looking for synergies but keep your own goals a priority

## Tool bias



- Locate the zealots; are they credible and respected? Marshal your arguments and make sure your solution is in-line with your company standards

# Who is in Your Court? Your Executive Sponsor

7

Who is in  
Your Court?

- Understanding your Executive Sponsor's situation is important to maintaining a supportive relationship with them.

## Why are they your Executive Sponsor?

- By default
- You approached them
- They approached you
- They were assigned by a more senior resource

## What are their resources?

- Will your budget reside in their area?
- What is their sign-off capability?
- What is their staff size?
- How are they regarded in your organization?

## What else do you know about them?

- Are they key in committees, ongoing initiatives?
- Are they regarded as the "heir apparent"?
- Are they always in hot water?

# Who is in Your Court? Your Executive Sponsor (CONT)

- Your Executive Sponsor should provide you a level of support – and expect results from you as well.

## How your Executive Sponsor can help

- Provide or support funding you need
- Help you navigate tricky political waters
- Run interference when needed
- Provide mentor referrals (can you have someone explain the budgeting process to me?)

## What do they expect of you?

- Weekly/monthly status reports?
- Metrics? How often, shared with who, of what?
- What will it take to ensure their continued support?

## Questions to ask your Executive Sponsor

- What do *you* consider success in this effort?
- Are there challenges you anticipate I might hit?
- What do you foresee next year's strategic initiatives being?
- Who do you think my most strategic partners should be?
- What do I need to do to ensure ongoing funding?
  - Deliver X by Y date?
  - Roll on X% of our users by Y date?
- If we succeed, is the company prepared to fund expansion? Can you guide me in that process?

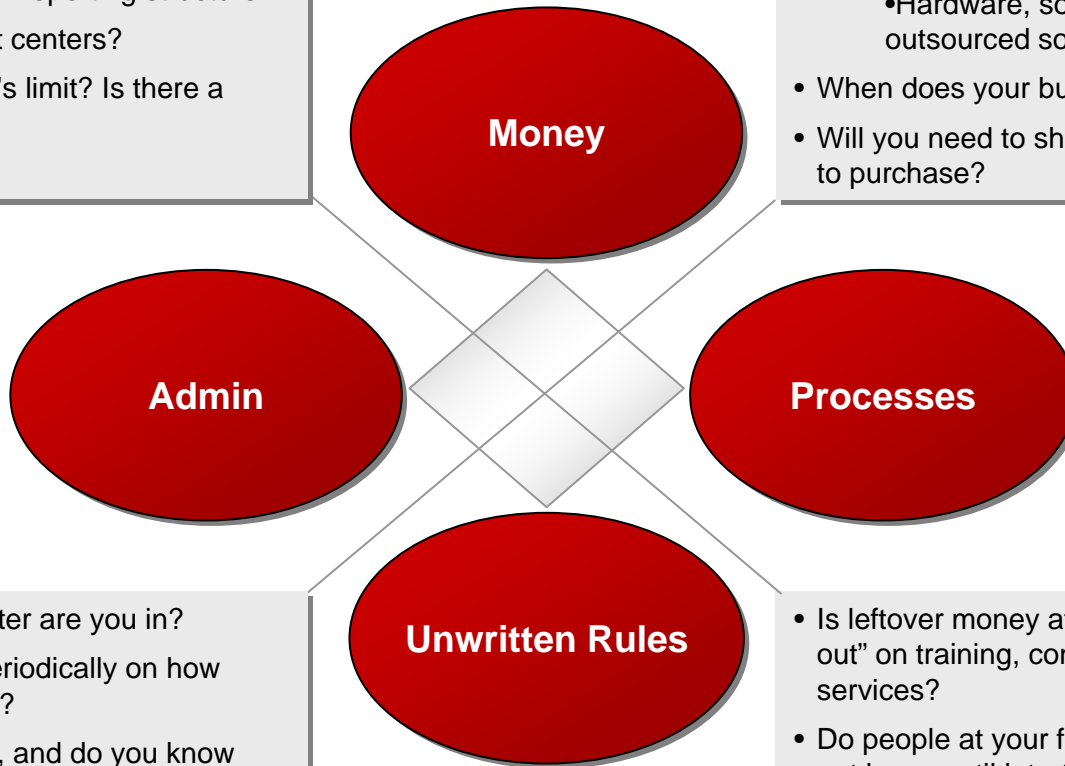
# Who is in Your Court? Other Supporters

---

- Build a network of “they get it” supporters
  - Keeping a running tally of ‘who is in your court’ is key to help navigate any obstacles that you can’t resolve even after you’ve identified them
  - Higher on the food chain is always good, but don’t overlook people with a lot of influence on decision makers
  - Make sure you have one decision maker that has budget in place for *every item you’re competing over*

- Is your Executive Sponsor funding your work?
- Or is it coming out of your reporting structure?
- Split across multiple cost centers?
- What is your/your signer's limit? Is there a dollar ceiling?

- Do you know how to spend money at your company?
  - Hardware, software, training, consulting, outsourced solutions
- When does your budget season start and end?
- Will you need to shift funds among cost centers to purchase?



- Whose budget or cost center are you in?
- Will anyone update you periodically on how much money you have left?
- Will you be approving bills, and do you know how?
- Are there “split” items, such as software maintenance?
- Who is available to consult with you as needed?

- Is leftover money at the end of the year “splashed out” on training, conferences, pre-purchasing of services?
- Do people at your firm lose budget dollars and not know until later?
- Do people routinely ask for X% more than they need because “they’ll take it away anyway?”
- Is there a defacto penalty for having money left over?

- Although budgets have a lot to do with Procurement, in larger firms they may be their own entity.
- Things to look for include:
  - Preferred vendors
  - RFP process
  - Supporting documentation
  - Budget/cost center numbers
  - Who runs Procurement, and can you get them in your court?
- Procurement can be invaluable in vendor relations

- You may have to employ creative means to satisfy ROI requirements at your company
- You need to know:
  - How ROI is calculated at your company
  - When ROI projections/reports are required
  - What counts as ROI
- Expect challenges
  - Leverage your Executive Sponsor
  - Try to get the ROI guru at your company into your court
  - Consider keeping “dual entry” ROI ledgers
- Don't hesitate to ask for help in successful KM-based ROI models
  - Get help from vendors
  - Network and find KM ROI models that other companies have used
- Obtain agreement with your Executive Sponsor and the ROI Guru about what constitutes ROI for you
  - Make sure they'll support it at budget time

- Getting the cooperation of all the entities we've mentioned so far will be much easier if they've heard of your work *before* you deal with them
- Develop your own strategy for getting to the red carpet at your company
  - Live and die by a solid communications plan
  - What does the red carpet look like at your company?
    - Speaking opportunities
    - Communications vehicles (intranet, newsletters, email updates)
    - Roadshow opportunities

# Where Do You Go From Here?

12

Where Do  
You Go From  
Here?

- So, you've navigated Round 1 of committees, you're a whiz at your company's budget process and have a regular monthly column in your organization's newsletter.



# Questions?

---



*We Will Help You Sell More Stuff To More People More Often For More Money More Efficiently.™*

Stacy Land  
Senior Knowledge Manager  
stacy.land@zyman.com  
404.682.5498

**www.zyman.com**  
**404.682.5400**