Knowledge Management Process

University IT Service Management Steering Committee
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Knowledge Management Process Design Participants

- Caroline Alemany – Technical Consulting Services
- Tain Barzso – Computer Resource Consulting
- Jan Cicero – Client Support
- Marvin Kirkendoll - ITOC
- Jim Knox – Comm Services
- Kelly Miller – Admin Services
- Jon Russell – Client Support
- Vesna Siracevska – Service Management
- Marco Wise - Comm Services
- Adam Mason (Acorio)
Goals

- Align knowledge management process within University IT to common ITSM practice
- Prepare for Service Now Technical Design
- Define goals, roles, objectives and the Knowledge Management business process
- Define Policies
- Identify areas where Stanford deviates from best practice, limit where possible
- Create a knowledge process that people will use
Output

- University IT Knowledge Management Process Document
- Knowledge Management Executive Summary
- Process Diagram
- Approval Workflow
- Common understanding of Knowledge Management Process
Knowledge Management Definition

The Knowledge Management process provides the ability to deliver quality by providing the ability to store/capture, share, and re-use data and information; consistently and accurately. *It provides a means of storing "head knowledge" for everyone to use.*
Objectives of Knowledge Management

- To provide a portal or channel for accessing the knowledge repository.
- To manage the knowledge based on information and data.
- To ensure the accuracy of the knowledge repository.
- To provide knowledge (data and information) in a timely fashion, leading to improved efficiency.
- To improve the quality of service by enabling service provider efficiency.
- To increase satisfaction by improving the quality of information provided.
Policies

• Policy Review
  • Knowledge Management policies will be reviewed and updated annually

• Article Review
  • All knowledge repository articles will have a default expiration date for review of two years and revised or retired as appropriate
  • Articles must adhere to the standards established by the Knowledge Owner and Communications Team
  • Each article will have two levels of approval

Stanford University
# Knowledge Management Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>Knowledge Process Owner</td>
<td>Senior Manager with the ability and authority to ensure the process is rolled out and used by all departments within the University IT organization</td>
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<tr>
<td>Knowledge Manager</td>
<td>Responsible for day-to-day management of all Knowledge Management process activities</td>
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<tr>
<td>Knowledge Coordinator</td>
<td>Embedded within each workgroup to review submitted draft articles</td>
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<tr>
<td>Knowledge Contributor</td>
<td>The source initiating the knowledge article</td>
</tr>
<tr>
<td>Service Manager</td>
<td>Reviews and, in coordination with Subject Matter Experts (SME), edits knowledge articles as they relate to their services</td>
</tr>
<tr>
<td>Subject Matter Expert (SME)</td>
<td>Creates or reviews articles for their area of expertise</td>
</tr>
<tr>
<td>Communications Expert</td>
<td>Responsible for establishing the structure for knowledge articles according to University communication standards and edits content on public facing articles</td>
</tr>
</tbody>
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Process and Approval States

Process States
- Draft
- Review
- Published
- Pending Retirement
- Retired
- Canceled

Approval States
- Requested
- Approved
- Returned
- Rejected
Knowledge Management: High-Level Process Diagram

Submit Content to Knowledge Repository
- New articles are created and routed for publication approval
- Revised articles are routed for re-publication approval or retirement
- Retired articles are approved for retirement and removed from publication

Use the Knowledge Repository
- Everyday use of knowledge articles happen in this activity
- Activities are performed through direct query/search or information request (via Service Desk or self-service portal)
- Articles are used by other processes for information

Knowledge Management Strategy & Planning
- Structure for Knowledge Management System (KMS) is defined
- Knowledge Owner, Knowledge Manager and other roles are identified
- Governance Model and performance measures are defined
- Knowledge awareness campaigns are conducted for successful adoption

Data and Information Management
- Rules around Data and Information such as content, format, security and privacy are constructed
- Enterprise data dictionary is defined to incorporate organization’s data syntax

Knowledge Transfer
- Knowledge gaps are analyzed
- Knowledge is transferred to Business Customers, End Users, Operations and Support Staff

Incident Process

Problem Process

Change Process

Request Fulfillment
Metrics

- Most popular articles (with sort capability)
- Article by Star Rating
- Aging Knowledge Articles
- Articles by process state
- Articles by approval state
- % of knowledge repository used
- Number of incidents deflected by knowledge articles
- Number of incidents not deflected by knowledge articles
- Knowledge articles flagged as workarounds
Work Left to be Done

• Validate process
• Update documentation within Navvia
• Update Technical Design user stories
• Hire Knowledge Manager
• Develop Knowledge Management Strategy & Planning
• Identify and assign roles
• Socialize new process
Questions