

The GartnerGroup Checklist for KM Professional Services

Selecting a KM ESP requires looking beyond project management skills and business trend rhetoric for KM-specific competencies. A checklist of competencies can collectively signal ESP excellence in KM.

Core Topic

Electronic Workplace: Knowledge Management Product and Service Vendors

Key Issues

What service vendors provide leading-edge consulting in knowledge management design and implementation?

Note 1

ESP Definition

Consultants, contract employees, systems integrators and outsourcers are collectively referred to as "ESPs."

Note 2

Evaluating ESP Project Management Capabilities

Evaluation of the capability of an ESP to deliver projects and business process designs has been the subject of extensive GartnerGroup research (see *ESP Research Note KA-CON-257*, 6 June 1997; *Research Note TU-03-5521*, 20 February 1998; and *DSAV Research Note KA-ENT-048*, 30 October 1997).

Note 3

KM Team Member Skills

The hiring enterprise should interview the individual members of the primary ESP KM team. At a minimum, this should include the project manager and the team leaders or lead analysts (e.g., the technical implementation leader, the KM system architecture/design leader and the cultural change team leader) to assess the depth of their experience with KM cultural and technology challenges, as well as their fit with the hiring enterprise style and values.

When evaluating an external services provider (ESP), a strong history of success in project management and business engagements is a necessary (but not by itself sufficient) predictor of success in knowledge management (KM). Enterprises selecting KM ESPs should also require KM-specific performance, skill and expertise (see Note 1, Note 2 and Note 3).

1. Strength of the ESP's Internal KM Implementation: If the ESP has no program for managing its intellectual assets, go no further; this signal of the ESP commitment to KM is an entry-level qualifier. Assessing the ESP's KM program requires a structural view and a cultural view. The structural view is how long the program has been in place, program scope (enterprisewide or a narrower implementation), the metrics established to gauge program performance, and the infrastructure supporting the program. The cultural view is an evaluation of the success with employee participation, what incentives the ESP provides for employees to participate and future plans for the program. The ESP should demonstrate its KM technology, provide an overview of the architecture, and identify several employees to discuss their use of the program and its value to their work.

2. Completeness of KM Vision: The ESP should present a vision for KM that is different from information management (see *IDOM Research Note TU-KM-458*, 17 December 1997). The GartnerGroup KM Process Framework (see *Commentary COM-04-6818*) is a reliable yardstick for the scope of the vision across process, content and functionality. The ESP's vision should span KM subprocesses and activities (knowledge creation, sharing and application) and the increasing intertwining of knowledge work and technology tools. The ability of individual consultants to present the vision is an indicator of an ESP's ability to lead clients toward support of the complete KM process.

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3. Reference Cases: The ESP should provide reference cases/clients: at least one with an enterprisewide KM program; one with KM as a tightly integrated component of a key business process; and one that addresses all subprocesses of KM (knowledge creation, knowledge sharing and knowledge application). Enterprises should ask for references with demographics similar to their own, make site visits, and use the visits to evaluate the reference programs and to validate their own KM objectives and vision.

4. KM Technology-Specific Expertise: ESPs should demonstrate expertise on three levels: 1) an understanding of the technical components of a KM architecture and its deployment of integrated semantic, collaborative and visualization technology; 2) an understanding of the foundation technologies of KM and their roles in delivering overall architectural requirements; and 3) proficiency at assessing the needs of knowledge workers to communicate, capture and retrieve explicit knowledge and manage relationships (see Note 4).

5. KM Program-Specific Expertise: ESPs should have a formal methodology for KM program development and should demonstrate proficiency in six KM-specific techniques: 1) defining a KM strategy (how and where the enterprise will use knowledge to compete); 2) identifying the explicit and tacit intellectual assets critical to the strategy; 3) designing a knowledge map of the business usage of knowledge assets; 4) organizing and completing a knowledge audit; 5) designing the KM administration function (roles, responsibilities and jobs), including organizational placement of a chief knowledge officer, KM program ownership and knowledge content ownership; and 6) managing the enterprise transition to a culture of collaboration and knowledge sharing (see Note 5).

6. KM Cultural and Organizational Skills Transfer: ESPs should have a strong track record in leading/influencing their clients to develop internal capability for KM programs; to build KM solutions and infrastructure that will evolve; and to continually increase the value of their knowledge content. A good test is to ask reference clients the following question: If the ESP walks away, will the KM team, program and culture survive and continue to gain momentum?

Bottom Line: ESPs must exhibit a KM vision (not a “re-purposed” vision from the past), competence in advanced KM technology and a thorough grasp of the need to develop a sharing culture. Failure to perform in any of these competencies by an ESP will diminish the ability to add the value needed to implement a “real” KM program.

Note 4

KM Technology and Architecture

Key research on KM technology and architecture techniques in which ESPs should demonstrate skill and expertise includes:

- “Evolution of Knowledge Management: Three Dimensions” (IEW *Research Note* KA-KMGT-1738, 21 August 1997)
- “Knowledge Retrieval Technology Defined” (IEW *Research Note* T-KM-1758, 24 October 1997)

Note 5

KM Program Development Techniques

Key research on KM program development techniques in which ESPs should demonstrate skill and expertise includes:

- “Building Knowledge Maps: A Love of Labor” (*Research Note* T-03-3125, 9 February 1998)
- “Choosing a KM Strategy: One Size Does Not Fit All” (*Commentary* COM-03-9743, 19 March 1998)
- “Will Enterprise Performance Benefit From Knowledge Management?” (*Research Note* SPA-04-7138, 4 June 1998)
- “Will Job Performance Benefit From Knowledge Management?” (*Research Note* SPA-04-7063, 4 June 1998)

