KM White Paper – pilot projects

Piloting

A key component of your knowledge management strategy involves running some pilot projects. A pilot project is a project where knowledge management can be applied within the business, to address a specific business problem, and to deliver measurable results, and also to act as a proving ground for KM within the business. Pilot projects are valuable at three stages during implementation.

- During the earliest stages (Assessment or Pre-Assessment), to deliver proof of concept. At this stage you are not answering "How does KM work for us", rather seeking to answer "Would KM work for us at all?"
- During the Selection phase, in order to test specific KM tools and techniques, to answer the question "Would this KM tool or process form part of our KM framework? If so, what modification would it need?"
- In order to validate and perfect the KM framework. At this stage you are seeking to ask the question "What changes do we need to make to our KM framework before finalising it for roll-out?"

The four main purposes of running pilot projects are;

- To act as a learning field, where you can try knowledge management tools processes and techniques, finalise the knowledge management model, and answer the questions above
- To act as a seed for the knowledge management culture and behaviours, which can then spread into neighbouring areas of the business, and
- To deliver demonstrable value to the organisation, and so to prove the in-house business value of knowledge management, and
- To create stories for internal marketing purposes

Pilot selection

A pilot project should be selected around an area of business need. The business need leads the way, the KM pilot provides one or more possible solutions which can be tested. These are some of the areas where you might consider suggesting a knowledge management pilot.

- If there is the business critical activity that is new to the organisation, then rapid learning will deliver business benefits. If it is new to only one part of the

organisation, then transferring learning from where it has been done before, will give huge benefits.

- If there is repetitive activity, where continuous improvement is needed, then knowledge management can help drive down the learning curve
- If there is activity that is carried out in several locations, where performance level varies, then knowledge management can help exchange knowledge from the good performers, to improve the poor performers.
- Finally if there is an area of the business which is stuck due to lack of knowledge, then knowledge management can help develop the knowledge needed to get unstuck.

Pilot Ranking

If you have a selection of pilot areas, you need some way of ranking these opportunities so that you select the best one. It is very unlikely that you will be constrained by a lack of opportunity, it is far more likely that you will be constrained by a lack of resources to deliver the opportunities. So you need some form of ranking criteria.

These are some suggested criteria which we often use;

- if the project is successful, can we measure the difference, or the value generated?
- Is there is strong support from management?
- If we create knowledge, is it purely for the pilot team or can others use it?
- Finally, can we practically do it in the timeframe with the resources available?

You can imagine that, if you can answer yes to although these questions, you have chosen a good pilot project.

Organisation of the Pilot Project

The pilot project should be owned by the business, with KM providing support rather than leadership. There are three main roles in the pilot project

1. a business sponsor, who provides resources and agrees the goals

2. a leader for the pilot project, who should be someone from the relevant business unit or function

3. A KM professional, to provide support, KM expertise, and facilitation

The pilot project itself

Once you have decided on a pilot opportunity, then you need to think about the different phases of the pilot project.

1. Initially you need to raise awareness in the target area, and may need to do some "selling" of the concept to get people on board.

2. Then you need to scope the project to determine what time and resources are needed,

3. You need to tailor a local knowledge management system (a combination of roles, technologies, processes, activities and governance) that will fit the working patterns of the project team,

4. You need to embed the knowledge management processes and activities into the process of the business,

5. And then you need to measure and deliver the results.

Step 3 is the one where most KM judgment needs to be brought to bear. Often the simplest interventions can make a lot of difference. Perhaps a knowledge-sharing workshop is the place to start, rather than creating expectations around global communities, or similar. However each pilot will need to be assessed in terms of what's practical, what's quick, and what's going to fit with the work practices of the group in question, while still delivering a complete KM system. The KM support role described above is responsible for this assessment, the crafting of the local knowledge management framework, and facilitation of the processes and technologies involved.

Creating the story

If the pilot project has been a success, then the exchange of knowledge will have led to a reduction in cost, a reduction in time, an increase in profitability, or some other business measure. This gives you a success story, which you can use for further marketing of the benefits of change throughout the organization. This story will be best received, if it is told in the words of the business people involved. Ask the business manager, or one of the key players on the pilot project team, to define these benefits. If you can get a quote from them, or a video from them, this will be very powerful for you.

It may however be quite difficult to isolate the contribution that knowledge management has made, but you should be able to make a statement such as "knowledge management helped to deliver a 20 percent cost saving, measured against previous costs for this activity", or even "without the knowledge management activity, we would not have been able to deliver this 20 percent cost saving, measured against previous costs for this activity

Visit our website at www.knoco.com for ideas, resources, publications and free downloads such as newsletters, slide sets, white papers, self-assessment tools, and video

Contact us for a regular subscription to our newsletter

Subscribe to our blogs at www.nickmilton.com, www.tomyoungblog.com

View our YouTube video at http://www.youtube.com/miltonnick

Order free KM tools and templates

Communication Plan template

Knowledge Management Plan template

KM Self-assessment tool

KM risk evaluation template

Order free KM guidance notes

KM Assessment

After Action Review

Knowledge Harvesting Interview

Knowledge Asset creation

Knowledge Exchange

Learning History

Peer Assist

Retrospect

Knowledge Site Visit

Knowledge Management Plans

Email us

nick.milton@knoco.com   (Knoco UK)
tom.young@knoco.com   (Knoco UK)
ian.corbett@knoco.co.za   (Knoco South Africa)
siva@knoco.com   (Knoco India)
cgorelick@knocony.com   (Knoco New York)
j.gutierez@knoco.com   (Knoco's Spanish training partner)