

# **Executing Knowledge Management in Support of Mission Command**

## **Knowledge Management Representatives**



**Army Operational Knowledge Management Proponent  
22 June 2013**



## Forward

This handbook provides Knowledge Management officers, warrant officers and noncommissioned officers a better understanding of the Knowledge Management cycle and what they can do to better prepare and execute the process for their units. A planned and resourced Knowledge Management program assists the staff in streamlining information flow, and enables the Commander's decision making process.

This handbook briefly addresses the roles and functions of soldiers performing as Knowledge Management Representatives (KMRs). The Army relies on Knowledge Management to assist the Staff and Commander in developing more effective Mission Command processes. Knowledge Management is a key enabler in the Mission Command decision making process. This handbook will assist KMRs understand how to begin what can be a lengthy and iterative KM process.

This handbook has been developed using lessons learned from soldiers in the field. Input was provided by Knowledge Management soldiers serving in units in the Trained/Ready and Available/Deployed phases of ARFORGEN, and the Combat Training Centers (CTCs). Some key lessons learned include . . .

- Leadership must actively participate and support the Knowledge Management program; gaining that leadership involvement must be one of the KMRs first objectives.
- Knowledge Management must be initiated during the plan/prepare phase of operations (Reset phase of ARFORGEN); the program is unlikely to succeed if the unit waits until execution.
- Knowledge Management is an iterative process; a series of small changes will build into the larger changes desired, with less turmoil.
- Knowledge Management is a people-centric process; the technical systems enable the KM process, but cannot be the focus of it.

Andrew M. Mortensen  
LTC, AR  
Chief, AOKM Proponent



## Purpose of This Handbook

The purpose of this handbook is to help Army Knowledge Management Representatives (KMRs) and others directly involved in Knowledge Management, establish knowledge management in their organization.

This handbook provides KMRs one approach to transitioning into a knowledge management position more effectively and efficiently. The tasks in this handbook are designed – not as a systematic method of implementing knowledge management – but as a means to generate thoughts and ideas on how KMRs can establish themselves in their duties.

This handbook is intended as a companion manual to “Executing Knowledge Management in Support of Mission Command, Establishing a Knowledge Management Program” (The KMO Handbook), and presumes a new division Knowledge Management Officer (KMO) who has read, and is implementing the concepts in that handbook. As such, it is written from the perspective of a soldier, new to Knowledge Management, who has been assigned as KMR to a staff section. Though based a division staff scenario, the concepts in this handbook can be adapted to any situation; such as a brigade or battalion KMO.

This handbook incorporates lessons learned from a variety of organizations which have themselves established a successful KM program.

**Before you begin using this handbook, read and understand FM 6-01.1, Knowledge Management Operations (July 2012). It will provide the background necessary to understand this handbook.**

# Mission Command and Knowledge Management

**Mission Command is an inherent part of all operations.** Mission Command is the exercise of authority and direction by commanders, supported by their staffs, using the art of command and the science of control, to integrate the other warfighting functions in the conduct of full-spectrum operations.

Fundamental to Mission Command are the organization's decision-making and knowledge transfer processes, which is where the Knowledge Management Representative (KMR) takes on an important role.

**Knowledge Management is an integral part of Mission Command.** Knowledge Management (KM) supports the commander by providing the bridging focus between the art and science of command. Effective Knowledge Management is an essential task in Mission Command, and can directly influence the organization's mission success.

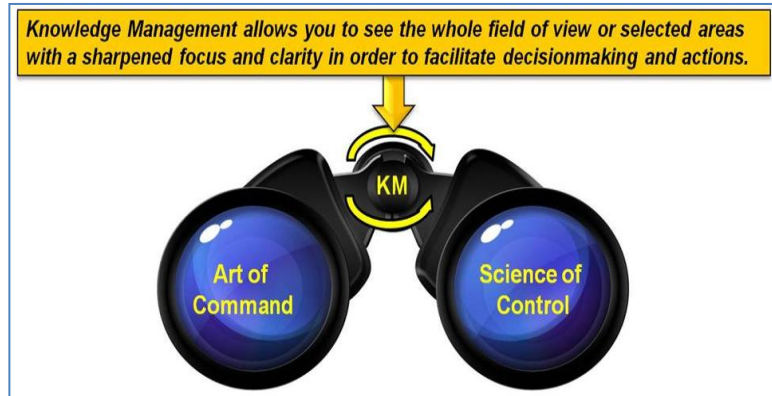


Figure 1. Mission Command in Focus.

**Knowledge Management is the process of enabling knowledge flow to enhance shared understanding, learning, and decision making.** The objective of KM is to create shared understanding through the alignment of people, processes, and tools within the organizational structure and culture, in order to increase collaboration and understanding. Shared understanding results in better decisions and enables improved flexibility, adaptability, integration, and synchronization, resulting in better organizational decision-making.

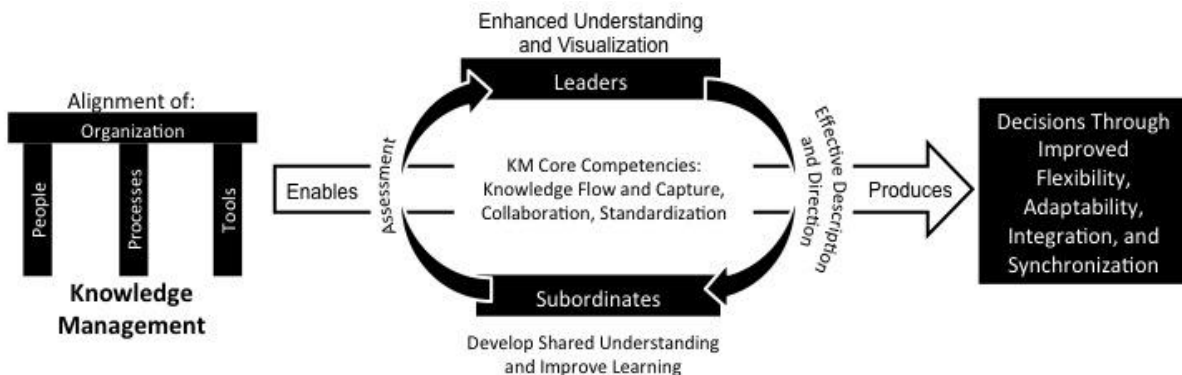


Figure 2. Knowledge Management Supports Decision-Making.

# Fundamentals of Knowledge Management

FM 6-01.1 (Knowledge Management Operations) defines Knowledge Management as “the process of enabling knowledge flow to enhance shared understanding, learning and decision-making.” Knowledge Management (KM) comprises four major components: people, process, tools, and organization. Though tools – especially digital tools – are often thought to be the primary component of KM; the far more important aspects of KM are the people and the processes they use to create, organize, apply, and transfer knowledge. This is why this handbook focuses on analyzing and developing the processes used by the soldiers in an organization. Knowledge Management is NOT SharePoint; but a five step process, employed by soldiers, to achieve individual and organizational objectives.

**Assess** information flow in the organization. Identify obstructions to the free flow of information (knowledge gaps), and identify the means of eliminating or minimizing those obstructions (knowledge solutions). The problem may be as simple as difficulty in finding reports on a website, with an equally simple solution, or as complicated as synchronizing the collective knowledge of an Army corps.

**Design** KM products and processes which effectively and efficiently improve information transfer. Develop a knowledge strategy will best meet the unit’s information needs. This could be as complicated as designing a knowledge network, or as simple as redesigning reports that provide the commander decision-making information.

**Develop** a knowledge management solution to the problem, and requirements, processes and procedures which implement that solution.

**Pilot** the KM solution by implementing it on a small scale and testing it with soldiers. Identify and correct problems, and prepare it for full implementation in the organization.

**Implement** the validated solution, to include training and coaching personnel in their roles and responsibilities. Monitor the implementation in order to identify and correct problems as they occur.

If you have read and understand FM 6-01.1, you should understand that developing a KM program is not a single cycle of the KM Process, but an integrated series of cycles – some sequential, some in parallel – which improve the processes of knowledge acquisition, analysis, and presentation. Rather, a series of “quick wins” and other improvements to the unit’s Mission Command and decision-making processes, each of which will involve its own cycle of Assess, Design, Develop, Pilot, and Implement. These processes are critical to Mission Command and organizational decision-making, which is why this handbook focuses on Mission Command,

## Knowledge Management Tasks

- Create knowledge
- Organize knowledge
- Apply knowledge
- Transfer knowledge

In other words, an effective KM program is an integrated series of cycles (iterations of the KM Process) – some sequential, some in parallel – which together translate knowledge into operational effectiveness and operational success.

This will necessitate the KMR focus on the KM tasks described in FM 6-01.1: create knowledge, organize knowledge, apply knowledge, and transfer knowledge. And, in case the point has not been made clearly, the KMR must avoid focusing on tools (most, commonly digital tools), at least initially. White boards, black boards, clip boards, and the palm of a hand can all be effective KM tools, when they are being used to transfer knowledge. But a “cool tool” which isn’t used, or fails to improve an organizations knowledge flow, is a waste of resources, and can cause a developing KM program (and the KMR implementing it) to fail.

If the KM team gets it right, the Commander spends his time making critical decisions, and not trying to find documents. This is where the new-to-the-job KMR can achieve early successes, and where the Army Knowledge Management Proponent recommends that new KMR’s focus their efforts.

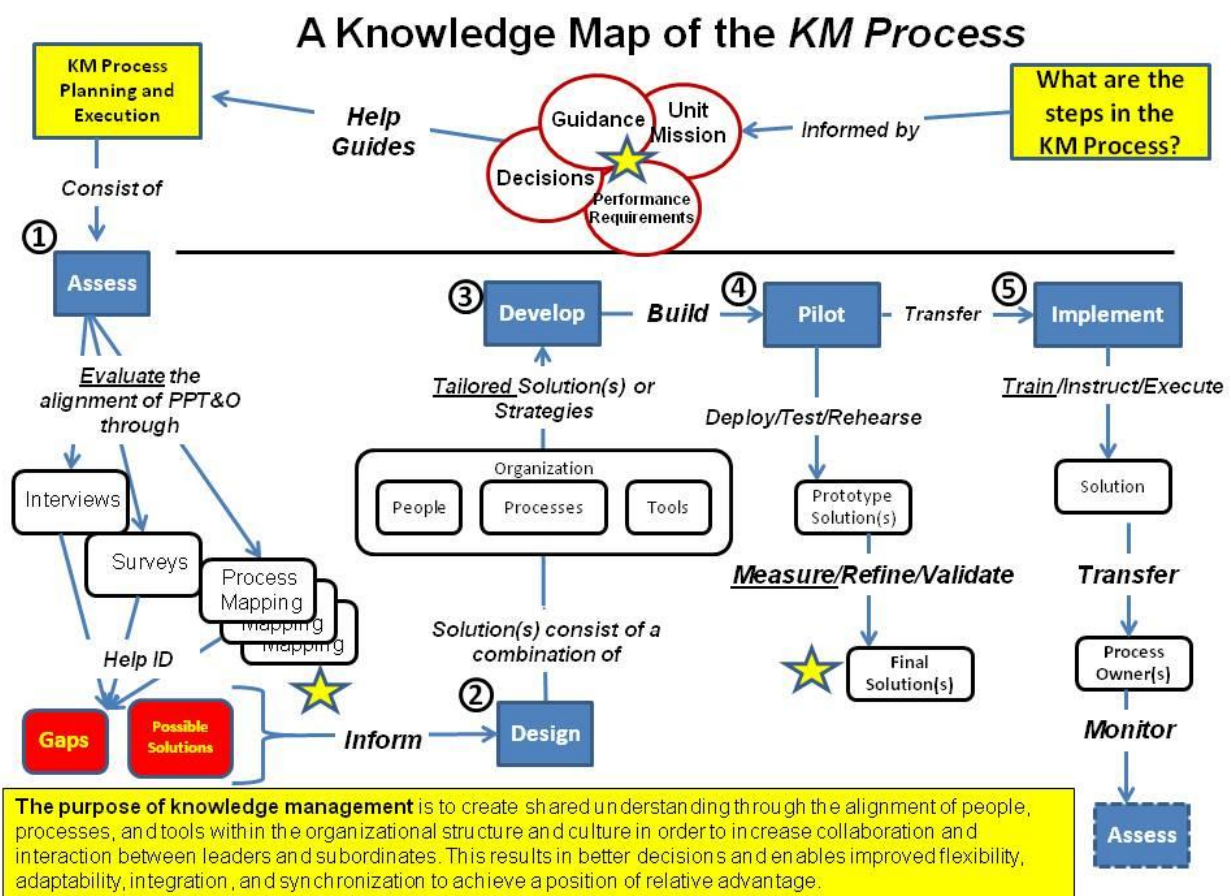


Figure 3. KM Knowledge Map.



## A Knowledge Management Framework

In Knowledge Management, as with most everything, success requires a good plan; in this case, a plan to implement a KM program. Experience in implementing KM programs in major Army organizations indicates a three-phase approach, focused on Mission Command and decision-making, to be the most successful.

This approach requires the KMR to keep focused on the tasks of creating, organizing, applying, and transferring (COAT) knowledge, and **the Knowledge Management objective: “Getting the right information, to the right people, in the right format, at the right time, in order to arrive at the right decision.”**

In Phase 1 the KMO must establish KM as a concept that will make the Commander, staff, and organization more efficient and effective – and therefore more successful. Experience has shown that, along with developing relationships with the staff (in order to build support for the KM program), it is absolutely critical that the unit’s leadership actively supports the KM program. When the Commander, Executive Officer, and Chief of Staff, are pushing the program, it will develop into greater effectiveness for the unit. If they aren’t, the KM program will flounder.

The objectives of this initial phase are twofold; achieve leadership buy-in, and demonstrate the utility of a KM program, in order to establish the KM program and develop some initial momentum. The KMO will accomplish these initial objectives with personal discussions with the leadership and staff, and some initial KM successes (quick wins). The KMRs support this effort by conducting similar discussions with their section’s leadership, and implementing the KMOs initial efforts within the staff section.

In Phase 2 the KMO will build on these relationships and early successes in order to establish the KM program as a means to greater efficiency (less time to do the same work) and effectiveness (doing more work with the available resources).

The objective of this phase is to develop the support of the staff and subordinate organizations for the KM program, and to begin identifying and solving organizational knowledge gaps. The KMO will accomplish these objectives by identifying and solving some of the unit’s knowledge flow problems (not-so-quick wins), thereby establishing KM as a means to greater effectiveness. The KMO will also begin development of a long-term KM program. The KMRs support this effort primarily through the Knowledge Management Working Group (KMWG); identifying and analyzing knowledge flow problems, and implementing necessary actions within their staff section.

In Phase 3 the KMO will build the KM program into an integral part of the unit’s Mission Command and decision-making processes. The KMO will accomplish this with detailed assessments of the organization, which are then developed into long-term improvements to the units decision-making and knowledge flow processes. There is no end to this phase, and it will

require a lot of detailed staff work. The KMRs continue their support this effort primarily through the KMWG, with more emphasis on long-term solutions.

It is not expected that KMRs would necessarily develop such a plan. However, if the KMO has read “Executing Knowledge Management in Support of Mission Command, Establishing a Knowledge Management Program” (the KMO Handbook), he will likely be executing such a plan, and the KMR will be acting in support. This is why the concept of an initial KMO action plan is introduced here.

### **Roles and Functions of the KMR**

The Division KMO is responsible for developing and implementing a KM program across the division, but KMRs perform a critical role in the division’s KM program. FM 6-01.1 defines KMRs as “staff section personnel officially designated as the agent of the staff principal to coordinate with the KM staff section,” and describes the KMRs contribution to a KM program in terms of advocacy, support, and knowledge brokering.

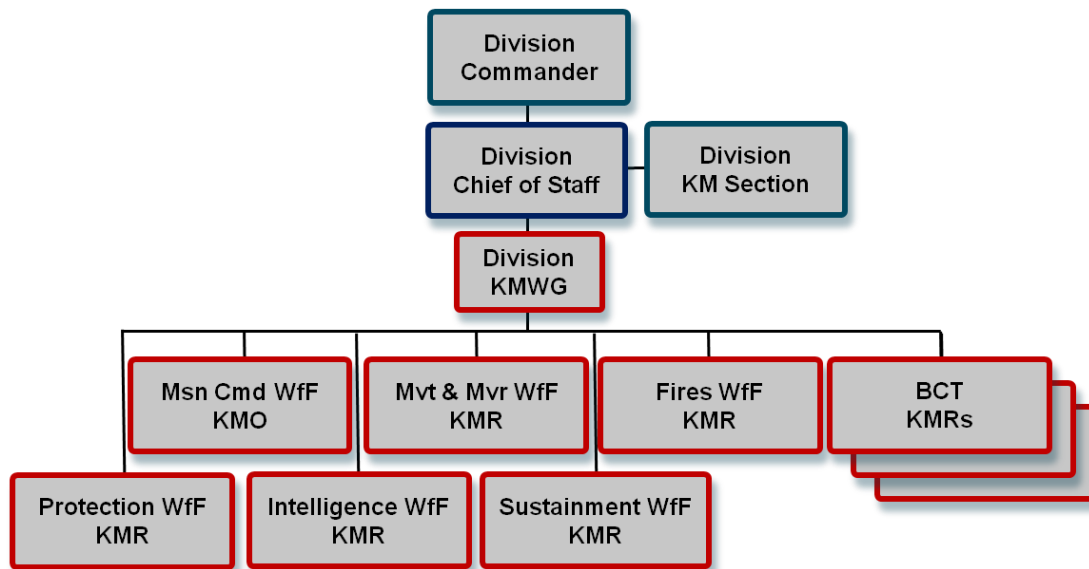
However, since the publication of FM 6-01.1 (July 2012), the Army Knowledge Management Proponent Office has come to understand that KMRs are much more important in establishing a KM program than originally thought.

**Advocacy.** FM 6-01.1 describes advocacy as spreading the KM message, educating and emphasizing the importance of sound KM practices. However, we are learning that KMRs must be more than mere advocates. They must also be leaders of change as the unit implements its KM program, and – more importantly – they must often function as KM enforcers, ensuring that KM standards, processes, and procedures are adhered to within the staff section.

**Support.** FM 6-01.1 describes support as acting as representative of their staff section for KM initiatives. But KMRs must be more than a representative. They must be an expert in their staff section’s knowledge processes, and an active developer and implementer of KM initiatives, as part of the division KMWG. The KMWG is the division’s primary means of developing and implementing KM initiatives, and is effectively the center of gravity for the KMR.

**Knowledge Brokering.** FM 6-01.1 describes knowledge brokering as linking colleagues to knowledge and information sources outside their immediate context. But KMRs be more than just a conduit for knowledge flow within and outside of the staff section. They are managers of that knowledge flow, the staff section’s leader in implementing KM, and the primary action officer in changing how their staff section does business

These evolving concepts elevate the KMR from “supporting partner” of the KMO, to active planner and implementer of KM initiatives. KMRs support the KMO’s plans as the organization implements its KM program, but they must also be KM planners, coordinators, and leaders. Change is hard, and requires constant monitoring and enforcement, and the KMR has two specific roles in the developing and implementing a KM program.



**Figure 4: Example Division KM Organization.**

First, the KMR is the staff section’s<sup>1</sup> representative to the Knowledge Management Working Group (KMWG). In this capacity, the KMR represents the staff principal, presenting KM issues to the KMWG, and developing solutions to be implemented within the division. The KMR is primarily responsible for implementing KM initiatives within the respective staff section. The KMWG is the division’s primary means of implementing a KM program, and effective participation is a critical task for KMRs.

Second, the KMR is the KMO for that staff section. The KMR will function as the primary KM planner and implementer of KM initiatives within the staff section, and will often have to act as “KM Enforcer” within the staff section; enforcing KM policies, processes, and standards. This will likely be especially necessary in the early stages of a KM program, as there will be a natural resistance to change (e. g. getting people out of the habit of emailing large attachments to multiple recipients, as opposed to posting the attachment on a common website). This will also include planning and executing KM training within the staff section.

A more doctrine-like perspective of KMR duties and responsibilities would be: (1) lead the implementation of KM within the staff section; (2) enforce KM SOPs, standards, and processes; (3) conduct section KM planning and integration; (4) conduct KM training within the section; (5) represent the staff section at KMWG and implement KMWG initiatives.

<sup>1</sup> In this context, “staff section” can also mean warfighter function, subordinate organization (such as a BCT), or other agency, depending upon how the division is organized.

## Essential Knowledge

Whether you learned you were being assigned to a KMR position before or after reporting to a new organization, the most important first step you can take is an assessment of your own KM knowledge and experience. KM is primarily a human process, and it is critical that KMRs understand themselves and how they interact with that process. The successful KMR must be well grounded in Mission Command, the Operations Process, the Military Decision-Making Process (MDMP), and Army decision-making. There are, however, several categories of information critical to success as a KMR.

### Know Yourself

Emerging insights from organizations developing KM programs indicate that KMRs must have two qualifications. First, the KMR must be an expert in their organization's processes and functions. Second, the KMR must have the authority to implement the changes and improvements developed by the KMWG within their staff section. The KMR must be someone who understands how things work, and can make things happen.

**Leadership TTP.** The Chief of Staff of one infantry division, deep in ARFORGEN and working to establish their Knowledge Management program, made it clear to all, who he intended to be KMRs for the division KMWG, when he told the primary staff, "Give me the right guy, or I'll take your deputy." In this organization the leadership's support and intent was very clear.

An accurate self-assessment of your KM expertise and experience will enable you to prepare for your assignment as a KMR, and will enable an objective section assessment. Identify what you know, what you should know and the skills you will need, and then act to acquire the necessary training. It is especially important that you have a thorough understanding of the fundamentals of KM and the KM process.

### Know Your Organization

The KMR must be an expert in their staff section's knowledge processes, and an active developer and implementer of KM initiatives, as part of the division KMWG. The KMR should understand the collaboration processes and procedures used by their section, and how knowledge flows within and without their section. The KMR must also thoroughly understand the knowledge processes the staff section has implemented, or must participate in (e.g. targeting process, MDMP, etc.). KMRs must also understand the sections knowledge requirements, how that knowledge is acquired, used, and transferred within without the section.

It is also important that the KMR have a detailed understanding of the staff sections organizational culture (people and processes). Learn as much as possible about how people collaborate and interact in order to understand how they interact and their roles in organizational knowledge flow. This is necessary to identifying obstructions to knowledge flow.

Keep in mind that shared understanding is as much a function of how individuals collaborate and share knowledge, as it is adherence to a set of standardized procedures. In order for an organization to be successful, there must be effective collaboration, and an important aspect of KM is ensuring that occurs. Knowledge integration, shared understanding, and organizational learning, in support of Mission Command will be at the core of the KM effort.

The KMR must also have a clear understanding of KM training requirements and gaps within the section; specifically knowledge of KM, knowledge of the division's KM policies and SOPs, and knowledge of the tools and systems used within the staff section. An important initial action is to ensure the training necessary is conducted as quickly as possible.

### **Know Your Program**

The KMR must thoroughly understand existing KM policies, programs, SOPs and plans. This will require the KMR to become intimately familiar with the division's KM, plans, current actions, and how the KMR is involved in those plans. The KMR must be intimately familiar with these plans, in order to assess how to implement it within the staff section.

These plans will likely be defined in terms of the KM components (people, processes, tools, organization) and with four specific types of actions: (1) actions to improve understanding of KM (e.g. additional training); (2) actions to develop an understanding of the organization's knowledge processes (e. g. attend battle-rhythm events and meetings in order to determine what inputs and products are required from your staff section); (3) people to meet, and what is to be discussed with them (e.g. battle rhythm events with primary staff officer); and (4) actions to initiate quickly (e.g. actions initiated by the Knowledge Management Working Group).

The KMO will also be developing, or have developed, a KM SOP for the division. This document will define the procedures, standards, and KM responsibilities within the division. The KMR must become intimately familiar with the requirements of the SOP; especially the standards the KMR will be expected to enforce.

The KMR must not only know the KM SOP in some detail, but must make sure the procedures and standards defined in that SOP are communicated to the staff section, and enforced. Without the enforcement of procedures and standards within each staff section, the division KM program will quickly become one more ignored program to be discarded when no one is watching.

## **Know Your Tools**

Experience has shown that the successful KMO must be more than a technologist (though it is common for personnel inexperienced in KM to believe that KM is “SharePoint” and the KMO to be the “SharePoint Manager”). For the KMO, an understanding of how technology supports knowledge processes is useful, but it is not critical. However, the KMR is much more of an implementer than the KMO, and must have a fundamental understanding of the tools and systems used within the staff section.

The KMR must also be knowledgeable about other tools which might be useful to the organization, such as KM Net, Defense Connect Online (DCO), and must be able to employ these tools in Mission Command, Operations, MDMP, and decision-making processes.

## **Know Your Battle Rhythm**

The KMR must be an expert in the division and section battle rhythm. The KMR must be an expert in the battle rhythm events the staff section supports, the products developed to support those events, and the knowledge processes required to develop those products. The KMR must also understand how changes to that battle rhythm effects the section. The KMR must understand the products the staff section develops to support battle rhythm events, and how they are developed and disseminated. This includes the process and requirements defined in SOPs, and the standards to be enforced for the development of those products.

## **Before You Begin**

As the KMO plans and implements KM across the division, the KMR (as section KMO) also plans and implements KM within the staff section; though with more emphasis on implementation. This is why it is essential that KMRs have the authority to implement KM initiatives and policies, and to enforce KM standards. Keep in mind that small successes, to implement KM processes, policies, and standards in your staff section, will be more successful than a long-term project. Other KM considerations include:

**People:** What is your section’s understanding of KM? Are there clear KM policies and procedures in place? Is there a need for training on those policies and procedures?

**Process:** What information is critical for decision-making? How is that information collected and shared? What battle rhythm events does your section attend, and what are the information requirements?

**Tools:** What information management tools and collaboration are being used, and how? Are they being used effectively?

**Organization:** What constraints is your section operating under? Is the KM program new or well established? What other organizations must your section interact with, and how?

## Initial Actions – Early Success

Experience has shown that successful KM programs generally start with quick, simple, successes – the “low-hanging fruit” – easy actions that can have an immediate positive impact on knowledge management in the staff section. Success breeds success, and nothing helps jump-start a KM program like successfully demonstrating to non-supporters how KM can improve the quality and efficiency of their work.

If the KMO is implementing the recommendations in the KMO Handbook, he will have two initial objectives: achieve leadership buy-in for the KM program, and demonstrate the utility of KM to the leadership. The KMO will attempt to accomplish these initial objectives by personal discussions with the leadership, and some initial successes (quick wins), in order to establish the KM program and develop some initial momentum. The intent should be to establish that an effective KM program can increase efficiency and contribute to mission success. In other words, demonstrate to the doubters that KM can provide them the means to accomplish the same work with less effort. KMRs should employ a similar concept, focused on three tasks.

### Develop the KM Leadership Team

Among the first actions a new KMO should take is to interview the section’s leadership, in order to establish leadership support and involvement in the KM program, and identify how the KM program could simplify or ease their workload. This can also be an important first step for the KMR, by conducting similar interviews with key personnel within the staff section.

Like all things; the KM program will be successful only with the active involvement of the leadership. The word ‘leadership’ has a double meaning in this respect. As part of the KMWG, the KMR, functions as a typical staff officer on the division staff. However, the role extends beyond merely transferring knowledge from the KMWG to the staff section. Within the staff section itself, the KMR and the principal staff officer ARE the leadership team, and must function as such; setting a good example, enforcing standards, etc.

**Leadership TTP.** The answers to these interview questions will provide ideas for quick successes, and early opportunities to employ the KM process in support of the unit’s leadership. For example, if your staff principal identified preparing for the Battle Update Brief as a continuing problem. You could then use the KM process to analyze the problem and develop a solution. It may be as simple as coordinating report procedures and templates (which can be quickly corrected), or as complicated as redesigning the flow of information within the staff section.

During these interviews, ask questions designed to identify knowledge-related difficulties, as a means of identifying specific ways in which a KM program can increase

efficiency and effectiveness. From these questions can come some of those quick-wins that will help establish the KM program. For example, you could ask:

- Is there critical information you are having trouble accessing?
- Is the staff providing the necessary decision-making information?
- Are there reports that don't make sense, or are not clear?

KMRs will also want to interview section personnel specifically involved in acquiring, analyzing, and transferring the knowledge necessary to the sections decision-making and Mission Command processes, such as planners and action officers. It is from them, that the KMR will learn the most about how information is acquired, analyzed, used and distributed within and without the staff section.

### **Conduct a Quick Assessment**

With the section leadership in support of the KM program, the KMR can then conduct a quick assessment of the staff section's knowledge processes; a task which is essential to the KMR's ability to effect changes within the staff section. Keep in mind that early successes will help build momentum for your KM program, and an initial assessment of the organization's battle rhythm has proven a good starting point.

The purpose of this assessment is to identify organizational knowledge gaps in order to establish procedures and processes to close those gaps. Or put another way, to ensure that the right information gets to the right people, in the right format, at the right time, in order to arrive at the right decision. Any bottlenecks (slowing down knowledge transfer) or barriers (preventing knowledge transfer) to that knowledge flow are a gap (the difference between perfect knowledge and current knowledge). The result of an assessment is a list of knowledge gaps, which can then be used to develop solutions to improve knowledge flow.

While it is theoretically possible to assess all of the organizational knowledge processes, experience has shown it more practical to conduct a series of limited assessments; each designed to analyze a specific segment of the organization's knowledge processes (e.g. battle rhythm, meeting management, etc).

This quick assessment will allow KMRs to assist the KMWG in developing solutions necessary to improving KM across the division; accomplished primarily through the KM Working Group. Potential focal points for a quick assessment include content management, battle rhythm, report processes, information flow, etc. Examples of the result of a KM assessment include . . .



**Assessment:** Decision-making information is not readily available to decision-makers, causing them to spend an inordinate amount of time searching for information.

**Solution:** Through interviews, determine what information the decision-maker requires on a regular basis; establish an SOP for collecting, analyzing, and posting that information to the staff section's SharePoint website.

**Assessment:** Information required for the Weekly Section Status Report, reported every Tuesday, is not collected and discussed with section leadership until the Staff Section Weekly Update, conducted every Wednesday.

**Solution:** Recommend to the principal staff officer that the Staff Section Weekly Update be changed to Monday, develop a standardized format for the information required for the Weekly Section Status Report, discuss the information during Weekly Section Status Report, and have the Weekly Section Status Report approved by the principal staff officer.

**Assessment:** Staff section personnel are having difficulty finding commonly used data, as a result of inconsistent file names.

**Solution:** Recommend to the KMWG that a division-wide standardized file naming convention be included in the Division KM SOP, conduct training for section personnel on the format of the naming convention, and establish procedures to enforce its use.

### **Activate the KM Working Group**

The Knowledge Management Working Group (KMWG), established by the CoS or XO, will be the division's primary means of developing and implementing knowledge processes. It is also the KMRs primary means of influencing and improving those processes. Hence, active participation in the KMWG is a critical task for KMRs, as one of the KMR's primary functions will be as the staff section's representative to the KMWG. Keep in mind, however, the KMR is more than a representative; the KMR also implements KM initiatives within the staff section.

The KMO will likely use initial meetings to establish the KMWG's responsibilities and expectations. Initial topics will likely include commander's intent, CoS/XO's guidance, KM training requirements. The KMR must come prepared to discuss these topics, as well as key knowledge requirements and gaps, and assessment requirements (e.g. battle rhythm).

The KMO may also use initial meetings to develop an initial list of critical knowledge gaps and potential solutions, and to begin planning for an organizational assessment. The initial issues should be simple issues that are easy to implement (such as inconsistent or incompatible report formats). KMRs should be prepared to discuss how well they can implement changes, and achieve some quick successes with the KM program.

<p><b>Purpose:</b> To develop &amp; resolve processes, training, and technical KM issues to ensure knowledge flow through the CJTF/ DIV/MSE; provide input to identification of KM trends, needs and establish KM priorities</p> <p><b>B2C2WG Type:</b> Functional &amp; Integrated</p> <p><b>Frequency:</b> Bi-Weekly, Thursday, 1500</p> <p><b>Duration:</b> 60 minutes</p> <p><b>Location:</b> CJ6 Conference Room/Adobe <a href="#">KMO Room</a></p>	<p><b>Staff Proponent:</b> KMO</p> <p><b>Chair:</b> LTC John Smith</p> <p><b>Members:</b></p> <ul style="list-style-type: none"> <li>• Primary &amp; Special Staff KMRs</li> <li>• Unit KMOs</li> <li>• Webmaster</li> </ul> <p><b>CMD GP Attendance:</b> N/A</p>
<p style="text-align: center;"><b>Inputs</b></p> <p><b>ALL Members:</b> Recommended changes to tools, processes, required training and KM issues</p> <p><b>CJ6:</b> Planned network outages; technical/portal capabilities</p> <p style="text-align: center;"><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Updates to KM SOP</li> <li>• Changes to Processes</li> <li>• Recommendation to CoS ref Battle Rhythm</li> </ul> <p style="text-align: center;"><b>Feeds</b></p> <ul style="list-style-type: none"> <li>• The Command's Collaborative Processes</li> <li>• Portal Design</li> <li>• Information sharing/MDMP cycle</li> <li>• Knowledge documentation &amp; creation</li> </ul>	<p style="text-align: center;"><b>Portal Exploitation</b></p> <p><b>Products:</b></p> <ul style="list-style-type: none"> <li>• KM WG Battle Rhythm Site: (Link Site)</li> <li>• Standards: Battle Rhythm, Slide Master, Logo: (Link Site)</li> </ul> <p><b>Techniques:</b> Portal Change Request and Discussion Board</p> <p style="text-align: center;"><b>Agenda Items</b></p> <ul style="list-style-type: none"> <li>• Roll Call/Due Outs/Minutes of last meeting</li> <li>• Review of upcoming suspense(s)/issues</li> <li>• New Action Items (People, Process, Tech)</li> <li>• Staff and Task Force briefings</li> <li>• Due Outs</li> </ul>

Figure 5. Example KM Working Group Agenda

## **Long Term Actions – Long Term Success**

Any long-term plan must begin with a concept of operations; in this case, a KM strategy. This strategy should define the organizations KM vision, goals, and objectives (e.g. developing a shared understanding). These objectives can be described in terms of short, mid, and long-term goals, or in terms of improvements to decision-making and Mission Command processes.

This strategy should be a means for the KMO to define and describe an intended path from short-term accomplishments to long term success. The KMO will attempt to build on early successes in order to establish the KM program as a means to greater efficiency and effectiveness. This will require a more detailed analysis, and more work by the KMWG as they identify and solve the knowledge flow problems the unit is experiencing.

Remember that each solution requires its own cycle of the Knowledge Management Process (Assess, Design, Develop, Pilot, Implement). The KM plan will be changed often over time, and should continue to focus on the knowledge processes required for Mission Command and decision-making.

The role of the KMR is to support the development of this strategy, by providing insight into staff section processes and knowledge requirements. The KMR will also be heavily involved in implementing a KM strategy, and should be prepared to help the KMO analyze implementation requirements. Though the KM plan will be wide-ranging, covering every aspect of Knowledge Management within the division, there are some specific aspects the KMR should focus on.

### **Assess Organizational Collaboration**

An area commonly deficient in Army organizations is the use of collaborative tools. Collaboration is a basic element of staff work, and can directly affect organizational decision-making. Commanders tend to prefer to communicate to their staff and subordinate leaders through voice, which makes this a good starting point. A commander speaking directly to soldiers can communicate a clear intent and get instantaneous feedback. Look for ways to improve such collaboration.

SharePoint is the enterprise solution for the Army, and soldiers must understand the basics of this tool. The organization must establish and enforce standards for storing, sorting, and retrieving information from its SharePoint site. SharePoint can be both a collaborative tool, and a content management tool, that can provide great capability if used to its full potential. Note, however, that while common to most organizations, SharePoint and similar software are not necessary to a successful KM program. It may be more important to use existing software already common to all organizations, than to attempt to force something new.

**Collaboration TTP.** Some organizations, establishing a Joint Task Force involving non-military and non-governmental organizations (e.g. the State Department and the International Red Cross), have found it more effective to coordinate their battle rhythm using Microsoft Excel (which all of these organizations have and use), instead of relying completely on a SharePoint site or CPOF, which only the military organizations could access for collaboration.

Email should not be the primary means of collaboration, as it builds stovepipes and provides no means to verify a message was understood. Dependence on email for collaboration inhibits information sharing and decision-making. Analyze your organizations use of email, and develop procedures (e. g. collaborating on documents with SharePoint) to eliminate dependence on email.

### Assess the Battle Rhythm

An organization's battle rhythm consists of meetings, briefings, and other events synchronized in time and purpose. The battle rhythm is the primary means for the unit to synchronize the collection, analysis, and presentation of information for decision-making. A battle rhythm that fails to provide critical decision-making information in a timely and presentable manner hinders Mission Command and decision-making.

The KMO will probably manage this effort for the Chief of Staff. The role of the KMR is to provide insight into the staff sections battle rhythm requirements. Identify the inputs (information required), decisions, and outputs (information provided to other meetings and events), for each meeting and event. In other words, identify the knowledge flow required for these meetings and events. This will require interviewing those involved in each meeting and event, especially the decision-makers, and may also require attending some of these meetings.



#### Targeting Knowledge Flow Assessment

**Decisions:** Targets to be attacked

**Inputs:** Confirmed targets from Intel WG and available assets from Fires WG

**Output:** Targeting recommendations to Targeting Board

Figure 6. Example Battle Rhythm Analysis

**Battle Rhythm TTP.** A good technique to begin your Battle Rhythm analysis, is to analyze completely one sequence of knowledge flow (such as the Targeting knowledge flow), instead of taking on the entire organizational battle rhythm. Identify the WGs and boards inputs and outputs, and resulting decisions. Analyze the flow of information and how the meetings are conducted (you will have to sit in to do this). Identify the critical information flow with a view to determining if that working group is meeting its information objectives.

### **Assess Meeting Management**

Every meeting should have a clearly identified purpose, agenda, required participant roster, and inputs and outputs. Meetings should also be synchronized with other meetings and events in the organization's battle rhythm. When meetings are conducted properly, there is less wasted time. You may find that meetings are taking place in the wrong sequence or that some meetings are duplicative and can be eliminated.

**Meeting TTP.** A good technique for analyzing meetings is the "7 Minute Drill," as described in FM 6-01.1. The 7 Minute Drill is a way to ensure meetings are needed and effective. Each meeting lead presents a Quad Chart (see Quad Chart TTP below), which explains the meeting's purpose, attendees and how it supports decision-making, generally within 7 minutes. The Quad Charts, approved by the CoS/XO, are used later to assess meeting effectiveness and to ensure it is accomplishing its intended purpose. When approved by the CoS/XO, effective use of the 7 Minute Drill synchronizes meetings and prevents arbitrary changes.

Consider the following . . .

- Meetings must have a clear purpose (analyze for context and purpose).
- Meeting inputs (information requirements) and outputs (deliverables) must be identified and synchronized.
- Meetings must feed each other and ultimately lead to timely decisions.
- Meetings must be structured and conducted to support each other (information flow).
- Duplicative meetings must be eliminated.
- Meeting participants must have time to prepare.

**Meeting TTP.** A proven technique for managing meetings is the use of a quad-chart, depicting specific inputs, outputs, and required attendees (and other information as shown in FM 6.01-1), which keeps the meeting focused, and ensures the right people attend; (2) specified formats for inputs and outputs (in order to ensure the right information is available, and required information is forwarded, as required; (3) an executive summary, forwarded to the leadership and other meeting leaders (keeping everyone informed).

### **Assess Content Management**

Content Management tends to be a continuing problem in every organization. Fast-flowing knowledge supports Mission Command only when it can be quickly and easily accessed. That is dependent on developing a good Content Management plan (which will become a part of the KM SOP), and training people in those procedures. The KMR will be primarily involved in enforcement of content management requirements, standards, and procedure, but must also be involved in their development.

Content management is one of the key areas that KMRs can implement quick wins to show KM utility. Content management is always an issue in an organization, as most organizations have too many systems, networks, programs, databases, etc.

Start with a content analysis. Analyze the information being stored (knowledge content), how it is being stored, who is storing the information, and who is accessing the information and how. The objective is to make accessing the decision-making and planning information fast and efficient. Consider the following in your analysis . . .

- What decisions must be made, and what information is necessary for those decisions?
- Who uses the content and for what purpose?
- What are the inputs and outputs that feed those decisions?
- Who created the content and who is or is responsible for updating and deleting it?
- Where the content will be stored and what format will be used?

Based upon that analysis, provide recommendations to the KMO on a Content Management Plan which defines standards, processes, and roles for the organization as a whole, staff sections, and subordinate organizations. Include plan training requirements on those processes and standards for the entire organization. Standardized practices provide the means to share knowledge more efficiently and make knowledge integration routine. This plan should include, as a minimum . . .

- A file naming standard or taxonomy.
- Standardized procedures for storing and sharing the content.
- Standardized templates and forms for common reports can be useful in recording information with minimal effort.
- Procedures for dealing with obsolescent and out of date content (Archiving Procedures).
- Each section should have its own Content Manager, responsible for implementation and execution of the plan.

Once content management standards and processes have been implemented, the KMR will be ‘the enforcer’ of those standards and processes, and must conduct section training and establish procedures to enforce those standards and processes. The KMR can use lesson plans and slides from classes conducted by the AOKM Proponent for this training. What you are implementing is a pilot Content Management Plan, which will become part of the KM SOP.

At this point, a content management plan should have been piloted and this is the time to reassess the initial content management solutions. Most of the solutions should have been simple solutions, like naming conventions, identifying where to publish orders, reports, findings, and after action reviews. Additionally, a crosswalk of the orders process might drive changes to the content management plan.

Design and Develop content management standards and practices. Knowledge integration depends on understanding how knowledge should be stored (where and in what format), and how it can be retrieved. There must be a clear understanding of how to use the tools that store knowledge. This is one of the hardest tasks associated with knowledge management.

Capture content management standards in the KM SOP. The SOP should be written in a collaborative environment with input from the Information Management personnel, operations personnel, plans personnel, and all the primary staff representatives.

### **Implement a KM SOP**

Establishing a KM program requires developing a set of standardized practices and procedures, which can be used to train leaders and staff. The standardized practice for accomplishing that within the Army is a Standard Operating Procedures (SOP). The KMR should be very involved in developing a KM SOP.

The KM SOP should be as comprehensive as possible, defining the organizations KM objectives (e.g. developing shared understanding) and procedures, and incorporating all elements of knowledge management. Priority subjects for the KM SOP include: CCIR and how they feed

the COP, battle rhythm, and content management; responsibilities and procedures for the KMWG and KMRs

Items likely to be in the KM SOP include: KM planning and integration, KM training, KM standards and processes, and the authority and responsibilities of the division KMWG (of particular importance to the KMR as the KMWG is the primary means for developing and implementing the KM program).

The AOKM Proponent is still developing concepts for KM SOPs, but some elements currently thought to be required include:

- Commander's/Chief of Staff's intent for the KM program (e.g. improve organization knowledge flow, in order to better inform organizational decision-making);
- KMO and KMRs roles and responsibilities;
- Individual and collective responsibilities;
- KM Section operations and procedures;
- KM Working group responsibilities and procedures;
- KM in support of the orders process, the COP, and CCIR;
- Organization battle rhythm processes and procedures (e.g. battle rhythm approved by Chief of Staff) and meeting management;
- KM aspects of digital systems (e.g. CPOF);
- Knowledge products, file taxonomy, and meta-data requirements;
- Use of SharePoint, and other collaboration methods;
- Content Management procedures (e.g. file naming conventions, file posting and storage procedures; metadata; use of SharePoint, etc.);
- Email procedures (e.g. emailing large files is prohibited).



## Some Final Thoughts

If, as recommended, you have read FM 6-01.1 before beginning this handbook, you would have noticed, this handbook has dealt with only a small portion of the tasks a KMR might expect to deal with. The objective has not been to provide a detailed, step-by-step manual of how to implement Knowledge Management in an Army organization, but to deal with the most some common situations a KMR might face.

As such, this handbook is rather limited in scope, and has been written with the understanding that, as Knowledge Management progresses in the Army, better sets of TTPs will be developed. With this in mind, some modifications to the doctrinal KMR role, as described in FM 6-010.1, are being considered.

As Army Knowledge Professionals, you have the mission of sharing those lessons you learn with the rest of the Army. The best way to do that is to record them and report them to the AOKM Proponent office.

AOKM Proponent – LTC Andy Mortensen 913-684-6397  
[andrew.m.mortensen.mil@mail.mil](mailto:andrew.m.mortensen.mil@mail.mil)

Deputy AOKM Proponent – MR Martin Fries 913-684-6819  
[martin.s.fries.civ@mail.mil](mailto:martin.s.fries.civ@mail.mil)

Doctrine & Concepts – LTC Mike Kitchens 913-684-4498  
[michael.e.kitchens.mil@mail.mil](mailto:michael.e.kitchens.mil@mail.mil)

Capabilities Integration – MR Jim Claunch 913-684-6793  
[jimmie.l.claunch.civ@mail.mil](mailto:jimmie.l.claunch.civ@mail.mil)

Organization & Materiel – MR Travis Neely 913-684-4529  
[travis.r.neely.civ@mail.mil](mailto:travis.r.neely.civ@mail.mil)

Personnel – MS Olga Madigan 913-684-8680  
[olga.p.madigan.civ@mail.mil](mailto:olga.p.madigan.civ@mail.mil)

Training & Leader Development – MR Dustin Ashton 913-684-6357  
[dustin.g.ashton.civ@mail.mil](mailto:dustin.g.ashton.civ@mail.mil)

