Knowledge Management... in the real world

We can probably all agree that Knowledge Management is generally A Good Thing and that we should do more of it.

But what does “doing Knowledge Management” actually involve, and how as BAs can we ensure we effectively reuse our knowledge?

As BAs, we tend to fall into one of two camps; those that know a lot about the business in which they work and those that don't. As we all know, the latter isn't necessarily a problem as structured analysis of a business problem does not rely on domain knowledge but often our stakeholders, not unreasonably, prefer BAs to have at least a basic understanding of their business environment.

So within a BA team (as with many teams within a organisation), there will be those with knowledge of the business, and those without. The knowledge that exists will cover many different aspects of the business and no one person will know everything. However, those that don't know the *current* business will probably have useful knowledge of other businesses, including other industries and competitors.

Therefore when viewed as an overall function, the BA team often has a considerable amount of knowledge. However, given that this exists within the heads of various staff members, tapping into it when required is not going to be easy.

The key to successfully reusing this knowledge is not making those that know lecture everyone else until everyone has the same level of knowledge; the key is **cataloguing what is known** and defining **how it can be accessed** when required.

The knowledge that exists within a BA team can include:

What artefacts already exist and can be reused

Who the real decision makers and Influencers are

What business rules exist

How a particular business process is actually performed

What systems are relied upon - & by whom

What specific business terminology means

What happened on previous projects

Where reference material is held

HOW A COMPETITOR APPROACHED A SIMILAR PROBLEM

So how can you catalogue and reuse this information?

One quick and easy suggestion is to perform a **knowledge audit** across the team. This entails capturing *who knows what* within the team and allows quick identification of who can answer questions on a particular topic.

This can take the form of team profiles and be stored on a wiki, intranet site website or even a simple spreadsheet. As long as the storage mechanism is *searchable* and *accessible* to all, it doesn't really matter what tool you use. At a basic level, the profile could contain:

- NAME
- PROJECTS I'VE WORKED ON
- BUSINESS UNITS I'VE WORKED WITH
- STAKEHOLDERS I KNOW WELL
- TECHNOLOGY KNOWLEDGE (SCORE FROM 1 - 5)
  - RUBY
  - MYSQL
  - LINUX
  - PHP
  - ...
- BUSINESS STRATEGY KNOWLEDGE (SCORE FROM 1 - 5)
  - CRM
  - ERP
  - ...
- PREVIOUS EMPLOYERS

The Knowledge Audit is a quick but basic way to catalogue knowledge that exists within the team. However, it still relies on people talking to each other, which takes time and can involve a lot of repetition, particularly for popular topics.

Another technique is to produce **knowledge snapshot** documents. This involves individual BAs spending time generating concise but usable reference documents relating to key business domains, systems or departments. A suggested framework for such a document is as follows:

- SUBJECT HEADING (OBVIOUSLY)
- OVERVIEW OF RELEVANT ORGANISATION STRUCTURE
- KEY CONTACTS (INCLUDING WHO TO START WITH FIRST)
- OVERVIEW OF RELEVANT BUSINESS PROCESSES
- OVERVIEW OF RELEVANT DATA ELEMENTS E.G. HIGH LEVEL CLASS MODEL
- LINKS / REFERENCES TO PREVIOUS REQUIREMENT SPECS
- LINKS / REFERENCES TO OTHER ASSOCIATED DOCUMENTS

It is recommended that time is explicitly set aside for this activity – it's not generally something that can be done off the side of the desk. Allocating your BAs an agreed amount of time (e.g. half a day per quarter) for knowledge management activity is a great way of ensuring that valuable exercises such as this actually take place.

Not everyone digests knowledge in a written form so another suggestion is to hold brief (e.g. 1 hour) **discussion sessions.** These can even be over a lunch break as a "lunch and learn" session so that there's no argument about it interfering with project work.

Topics can cover anything but here are some initial suggestions:

- HOW THE ANALYSIS WAS APPROACHED ON A PARTICULAR PROJECT
- TIPS ON HOW TO USE A PARTICULAR TECHNIQUE
- WALKTHROUGH OF A KEY BUSINESS PROCESS
- A PARTICULAR INDUSTRY TREND
- HOW A COMPETITOR IS APPROACHING A BUSINESS PROBLEM

The key to this sort of session is to get the mix right in terms of the breadth and depth of information that is covered – the audience needs to come away with a *usable* level of knowledge so take care not to make it too high level. Similarly, trying to communicate a vast depth of information in an hour can overwhelm an audience and lead to more confusion than comprehension.

The final point to make on these sessions is that they don't have to be lectures – making them open discussions on a particular topic can be a great way to get people to share knowledge they didn't even know they had.

As the team starts to share and generate reusable knowledge, the need to manage this becomes more important. Therefore it makes sense to invest in some sort of **knowledge base.** There are many different options to deliver this, ranging from basic intranet sites and wikis up to purpose-built open source and commercial knowledge bases. Remember, if people can't find it, it won't get reused.

Whatever solution is used, there are some basics that need to be considered before it is used to share knowledge:

- EVERY DOCUMENT SHOULD HAVE AN EXPIRATION DATE AND AN OWNER SO THAT IT IS REGULARLY REVIEWED FOR VALIDITY; GIVING SOMEONE THE RESPONSIBILITY FOR MAINTAINING THE KNOWLEDGE BASE RARELY WORKS – IT'S A PRETTY THANKLESS TASK

- IT'S MUCH EASIER TO DEFINE YOUR METADATA (E.G. CATEGORIES, TAGS, TOPICS) *BEFORE* YOU START UPLOADING DOCUMENTS

- HAVING SAID THAT, IF YOU HAVE A LARGE COMMUNITY THEN LETTING THEM ASSIGN THEIR OWN TAGS CAN WORK VERY WELL AS A SYSTEM WILL EVENTUALLY EMERGE (A FOLKSONOMY). WITH SMALLER COMMUNITIES THIS DOESN'T WORK SO WELL

- WHEN DEFINING METADATA THINK ABOUT HOW OTHER PEOPLE ARE LIKELY TO SEARCH FOR THINGS, NOT JUST HOW YOU PREFER TO DO IT

The final suggestion when considering the use of a knowledge base is to schedule some time for regular reviews. The things you want to look out for are:

- IS IT BEING USED?
- IS THERE A CORE SET OF USERS WHO USE IT REGULARLY WHILST EVERYONE ELSE IGNORES IT?
- ARE THERE ONLY ONE OR TWO PEOPLE WHO ARE UPLOADING KNOWLEDGE?

A knowledge base only adds value when it's actively being used and the whole team is behind it.

HERE ARE SOME SUGGESTIONS OF OPEN SOURCE KNOWLEDGE MANAGEMENT TOOLS; THERE ARE MANY MORE OUT THERE:

KNOWLEDGE TREE COMMUNITY EDITION
WWW.KNOWLEDGETREE.ORG
TWIKI WWW.TWIKI.ORG
MEDIAWIKI WWW.MEDIAWIKI.ORG
PHPMYFAQ WWW.PHPMYFAQ.DE
MOINMOIN WWW.MOINMO.IN

KNOWLEDGE MANAGEMENT... IN THE REAL WORLD

Documenting and sharing knowledge and knowing who to speak to are one thing, but how do you ensure that this knowledge is actually reused? And how do you ensure that it is added to?

A simple suggestion is to set **performance objectives** around knowledge management. These should encompass both *generation* and *reuse*.

Some example objectives are as follows:

- OVER THE COURSE OF THE YEAR, FOR EACH ENGAGEMENT OR WORK PACKAGE, AGREE A MECHANISM TO CAPTURE RELEVANT KNOWLEDGE WHICH IS REUSABLE BY THE TEAM

- ACTIVELY PROMOTE THE REUSE OF KNOWLEDGE WITHIN THE BUSINESS ANALYSIS TEAM

- DEMONSTRATE HOW YOU HAVE REUSED EXISTING KNOWLEDGE FROM WITHIN THE BUSINESS ANALYSIS TEAM

So in conclusion, we hope this gives you some useful tips to get started with managing the knowledge that already exists within your team. The key messages worth remembering are:

- KNOWLEDGE IS ONE OF THE STRONGEST ASSETS A BA TEAM HAS
- MAKING USE OF THIS KNOWLEDGE REQUIRES SOME DEDICATED EFFORT – IT DOESN'T HAPPEN BY ITSELF
- KNOWLEDGE MANAGEMENT DOESN'T HAVE TO BE A HUGE TOP-DOWN INITIATIVE

If you want to find out more about anything covered in this document then please feel free to contact us via www.pragnalysis.com and look out for more (hopefully) useful tips and tricks on the website soon.

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