# KNOWLEDGE MANAGEMENT PROCESS

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**Comment [BV3]:** The document coding system should be in line with the organization’s existing system for document coding; in case such a system is not in place, this line may be deleted.
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<td>Branimir Valentic</td>
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1. Purpose, scope and users

The aim of this document is to define the purpose, scope, principles and activities of the Knowledge Management process.

This document is applied to the entire IT Service Management (ITSM) organization.

Users of this document are all employees of [organization name], as well as all external parties who have a role in ITSM.

2. Reference documents

The Knowledge Management process references all IT Service Management processes implemented in [organization name].

3. Policy

[organization name] uses the Knowledge Management process to manage the organization’s knowledge, capture it and make it available when needed to those who need it.

Goals of the Knowledge Management process are to:

- Improve decision-making process and efficiency of the organization
- Ensure and maintain a valuable knowledge of the organization, and in this way minimize reactivity of already good knowledge
- Maintain Service Knowledge Management System (SKMS)

The whole lifecycle of service is within the scope of the Knowledge Management process.

3.1 Definition

Service Knowledge Management System (SKMS)

[organization name]’s repository of knowledge. A set of tools and databases to gather, store, maintain, share, analyze and present knowledge of [organization name] used throughout the service lifecycle.

3.2 SKMS

[organization name] has a SKMS composed of:

<table>
<thead>
<tr>
<th>Content name</th>
<th>Owner responsibility</th>
<th>Content name</th>
<th>Owner responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration Management System</td>
<td>Configuration Manager</td>
<td>Problem Manager</td>
<td></td>
</tr>
<tr>
<td>Service Level</td>
<td>Service Level Manager</td>
<td>IT Employee skill</td>
<td>IT Service Manager</td>
</tr>
<tr>
<td>Customer/User Information</td>
<td>Customer/Service Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comment [BV4]: This is an example. Adapt to your own organization.
[Knowledge Manager] is responsible to maintain repository information.

3.3 **Content contribution**

Content of the SKMS, i.e. knowledge under the jurisdiction of the Knowledge Management process is contributed by [organization name] employees, such as [user name, list of names], users of the services, vendors and suppliers and external sources of expert knowledge.

4. **Process activities**

4.1. **Knowledge management strategy**

[role description] defines for [organization name] the following strategic directions in the area of knowledge management:

- Internal sources of knowledge, with respective taxonomy and responsibilities for knowledge management, are defined in the policy, which is a subchapter part of this document.
- External sources of knowledge are:
  - [equipment name] – [user manual]
  - [role description] is responsible to maintain external sources of knowledge.

4.2. **Knowledge transfer**

[role description] is responsible for:

- Performing gap analysis with the goal to detect missing knowledge needed to deliver services.
- Organizing knowledge transfer, which is done in the following ways (see Training and Awareness Plan in Appendix):
  - [role description]
  - Joint meetings
  - [role description]
  - Trainings
  - Newsletters
  - [role description]

4.3. **Managing data, information and knowledge**

Comment [BV5]: Change if needed.
Comment [BV6]: Adapt to your own situation.
Comment [BV7]: Define your own sources based on your organization.
Comment [BV8]: These are examples of best practice. Adapt to your own situation and requirements.
Comment [BV9]: These are examples. Define your own policy for knowledge management process.
[role description] is responsible to establish and maintain the Knowledge Management Plan (see Knowledge Management Plan in Appendix) in order to define, establish and manage [organization name]'s SKMS.

4.4. Using SKMS

[role description] is responsible to make sure that SKMS users is defined, regularly reviewed and updated in the Knowledge Management Plan (see Knowledge Management Plan in Appendix).

5. Roles and responsibilities

5.1. Knowledge Manager

[role description] assigns the Knowledge Manager role.

Responsibilities of the Knowledge Manager:
- Overall responsibility for carrying out activities within the scope of Knowledge Management
- Coordinates with other Service Management roles
- Plans and manages tasks needed to support the Knowledge Management process
- Responsible for reporting and managing information
- Serves as an information hub regarding all issues in Knowledge Management
- Motivates all contributors to add content to organisation's knowledge

5.2. Knowledge management process practitioner

[role description] assigns the Knowledge management process practitioner role.

Responsibilities of Knowledge management process practitioner:
- Identifies, controls and stores information relevant to the SKMS
- Ensures that information inside the SKMS is current and relevant
- Ensures that information is not duplicated

6. Measurement and metrics

6.1. Measurement

Indirect measurement of several parameters can provide information about Knowledge Management efficiency. [role description] is responsible to produce reports.

6.2. Metrics

Metrics reports are produced monthly, with quarterly and yearly summaries. Metrics to be reported:
- Number of incidents resolved by users due to lack of knowledge
- Diagnosis and repair time of incidents and problems
6.3. Critical Success Factors (CSF) and Key Performance Indicators (KPI)

[role description] is responsible to define CSFs and respective KPIs. Achievements against KPIs are monitored and evaluated by [role description].

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Key Performance Indicator</th>
</tr>
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<tbody>
<tr>
<td>Reduced time to solve incidents on Service Desk</td>
<td>Number of incidents solved with known error</td>
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</table>

Comment [BV11]: Example of CSFs and KPIs. Each organization must develop its own CSFs and KPIs depending on organization maturity and environmental circumstances. Achievements against KPIs must be monitored and used in other processes and as a basis for improvement.

7. Managing records kept on the basis of this document

<table>
<thead>
<tr>
<th>Record name</th>
<th>Storage location</th>
<th>Person responsible for storage</th>
<th>Controls for record protection</th>
<th>Retention time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKMS content</td>
<td>[tool name]</td>
<td>[job title]</td>
<td>Knowledge management process practitioner</td>
<td>SKMS content is archived when no longer relevant</td>
</tr>
</tbody>
</table>

Comment [BV12]: Overall responsibility for Knowledge Management. Usually Knowledge Manager.

Comment [BV13]: Change if needed.

8. Validity and document management

This document is valid as of [date].

Owner of this document is [job title], who must check and, if necessary, update the document at least once a year.

Comment [BV14]: This is only a recommendation; adjust frequency as appropriate.

9. Appendices

- Appendix 1: Knowledge Management Plan
- Appendix 2: Training and Awareness Plan

[job title]

[name]
[organization name]

[signature]

Comment [BV15]: Only necessary if the Procedure for Document Control prescribes that paper documents must be signed.