

# NEWS FROM THE FRONT



## Operationalizing Knowledge Management in an Army Service Component Command

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# **Operationalizing Knowledge Management in an Army Service Component Command**

## **Introduction**

This article is an account of the experience and initiative that drove major change in the United States Army South (U.S. Army South) Knowledge Management (KM) program from 2017-19, provided by MAJ Jeremiah Owoh, U.S. Army South, KM Chief. This record of enhanced practices and procedures is based on both doctrine and best practices. Although compiled from the capabilities and requirements of a single unit, the insights and lessons have applicability across the force, certainly with other Army Service Component Commands (ASCC).

## **Purpose**

To synchronize land component mission command, operations, and activities enabling the ASCC to maintain land domain situational understanding and command and control for forces operating across the geographic combatant command (GCC). U.S. Army South continues to evolve and improve practices to operationalize KM processes and procedures. Lessons and best practices by this command may well benefit other ASCCs, as well as, other units going through this transformation.

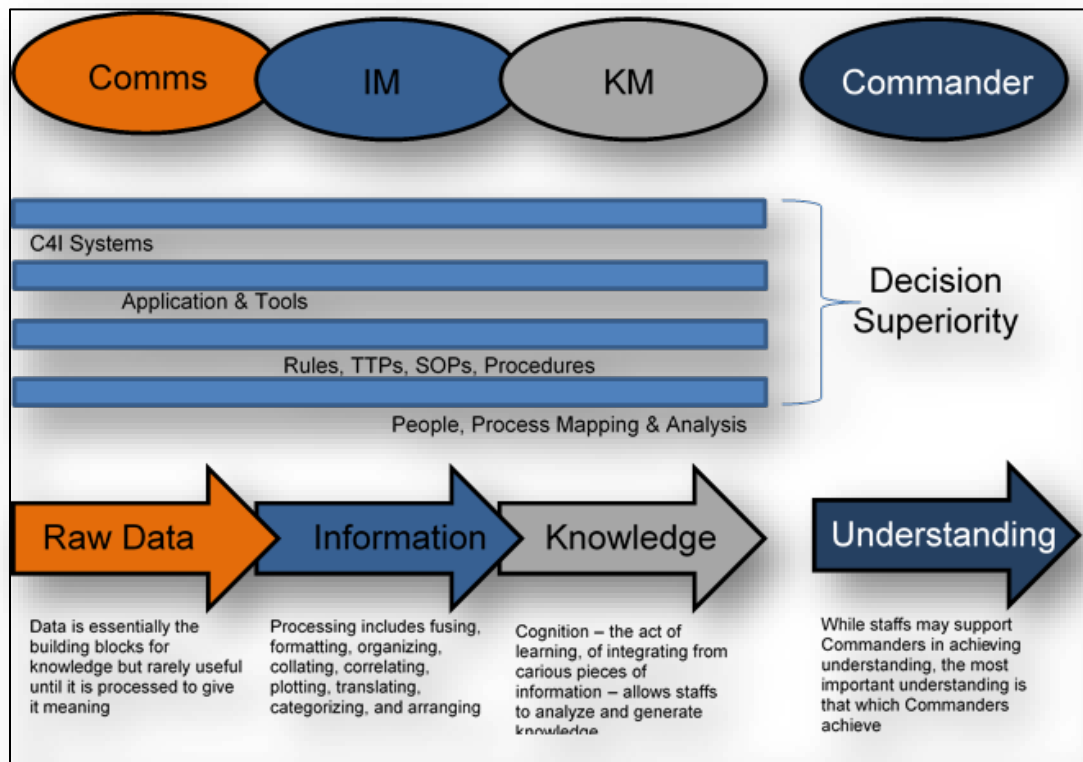
## **Doctrine**

According to doctrine, "Success in operations demands timely and effective decisions based upon applying judgment to available information and knowledge. As such, commanders and staffs seek to build and maintain situational understanding throughout the operations process. Situational understanding is the product of applying analysis and judgment to relevant information to determine the relationships among the operational and mission variables to facilitate decision-making." (Army Doctrine Publication [ADP] 5-0, Operations Process). Indeed, there a direct information linkage to the decision-making process supported by organizational roles and functions as depicted in Figure 1.

KM is the process of enabling knowledge flow to enhance a shared understanding and effective decision-making. At its lowest conceptual level, KM is ensuring relevant data and information are retainable and accessible to individuals in order to enable analysis and real-time, informed decisions.

As a FA26B, Information System Engineer, with no prior experience as a Knowledge Manager, I was assigned the daunting task of transforming U.S. Army South's KM program. I was unsure how to successfully approach this task. After some initial research, there was a realization the command did not want to hear about people, processes, and tools. They wanted actionable KM recommendations. Ultimately, I relied

on my experience as a staff officer and leveraging my knowledge of dissecting processes and visualizing ways to make them more efficient.



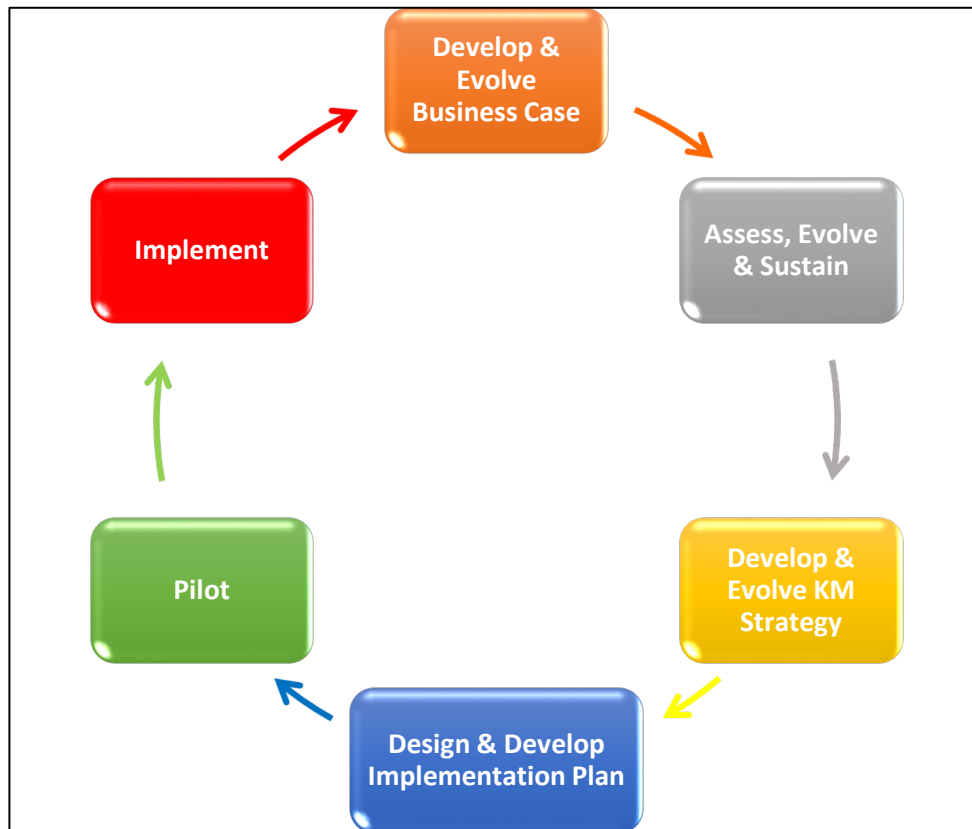
**Figure 1. Information Linkage to Decision-Making Process (Insights and Best Practices Focus Paper, Knowledge and Information Management, Third Edition, Deployable Training Division, Joint Staff J7, May 2018**

Realistically, most senior leaders do not have the time to focus on ensuring the effective alignment of their people, processes, and tools to ensure a viable and operational KM program. The responsibility of understanding the KM methodology and the organizational culture and construct belongs to the KM Officer (KMO). The KMO must fully understand the commander’s vision, intent, objectives, our people, internal and external processes, and the tools that contribute to daily operations.

### Assessments

**Insight Vignette:** To truly understand what drives your organization, first you must conduct a thorough assessment.

After conducting an assessment of our KM program, U.S. Army South developed the below KM Management Program Methodology diagram shown at Figure 2. It served as a fundamental pathway used in the 2017 Assessment Report to the Chief of Staff.



**Figure 2. Knowledge Management Program Methodology**

To properly assess requires the KM section to attend every battle rhythm event and major exercise. Key is understanding what are the meeting’s inputs and outputs, internal and external events, assigned personnel, and tools which are pertinent to Boards, Bureaus, Centers, Cells, and Working Groups (B2C2WG).

Depending on the size and scope of your organization, this assessment may take approximately 60-90 days which allows for concurrent development and submittal of the assessment report.

### **Knowledge Map**

In addition to the assessment report, the KMO must produce a knowledge map depicting the inputs, outputs, tools, information storage locations, purpose, KM

challenge areas, and key personnel involved in the organization's major processes, i.e. plans, key leader engagements, and operation planning horizons.

### Elements of Knowledge Management Maps

Concept maps/knowledge maps have these elements in common:

- The over-arching categories or major headings which can be one or more categories under a major heading.
- The paths or the channels along which information or knowledge moves or the link a category has with its supporting or connected parts. Paths indicate directional, bi-directional, or multi-directional linkage.
- Connecting verb or phrase or term(s) used to show the link and between one or more categories or elements of the concept.
- Gaps to show the delta between what the unit should know (can know) and what it does know. Knowledge or information that is required to fill a void in the concept or knowledge map.

ATP 6-01-1

Techniques for Effective Knowledge Management, Page 2-10  
6 March 2015

ATP 6-01-1 describes knowledge maps, along with concept maps, as being performed prominently during the assessment phase of the KM methodology. The ATP states "Knowledge maps provide the 'what' and 'where.'" They help to pinpoint where the knowledge resides, who has access to it, and what the knowledge consists of. We found the map to be very informative and beneficial because gaps will be apparent when the path of the knowledge flow is clearly depicted throughout your business processes. The gaps where knowledge is not available are exposed and should lead to strategic discussions on how to resolve the situation.

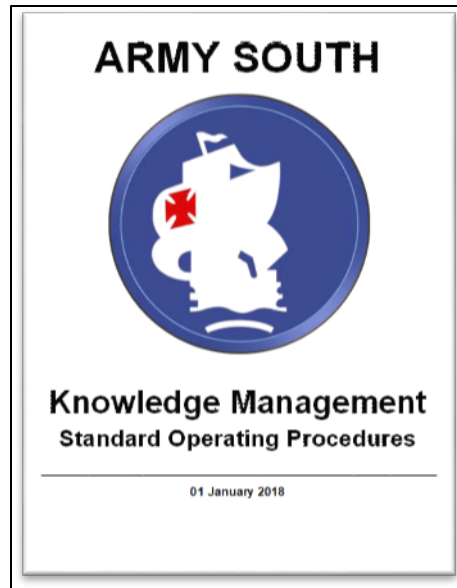
### **KM Framework**

**Insight Vignette:** Develop the KM framework at the completion of the assessment. The framework serves as a roadmap of milestones on how to improve the KM program. Establish short-term, which we termed "quick wins", and long term initiatives to ensure a more sustainable program.

Below is the list of U.S. Army South's short and long-term KM initiatives accomplished:

Short-term initiatives:

- Produced and implemented a Knowledge Management Standard Operating Procedures (SOP) manual (Figure 3). The policies and procedures included naming convention, historical information archival, training requirements, and elimination of manual processes.



**Figure 3. U.S. Army South Standard Operating Procedures (SOP)**

- Revamped the U.S. Army South SharePoint site. Specifically accomplished this to build confidence and promote using this powerful collaboration tool. Following major exercises, after conducting interviews across the staff, we found many personnel did not like using the old portal because it was hard to search for current and relevant documents. Our developers created a new homepage with information and links the general user needs to perform daily tasks. Additionally, the Commander's Dashboard was re-engineered to visually depict information and reduce the amount of clicks retrieving pertinent information. See previous and new Commander's Dashboard at Figures 4 and 5 below.



Figure 4. Previous U.S. Army South Commander's Dashboard

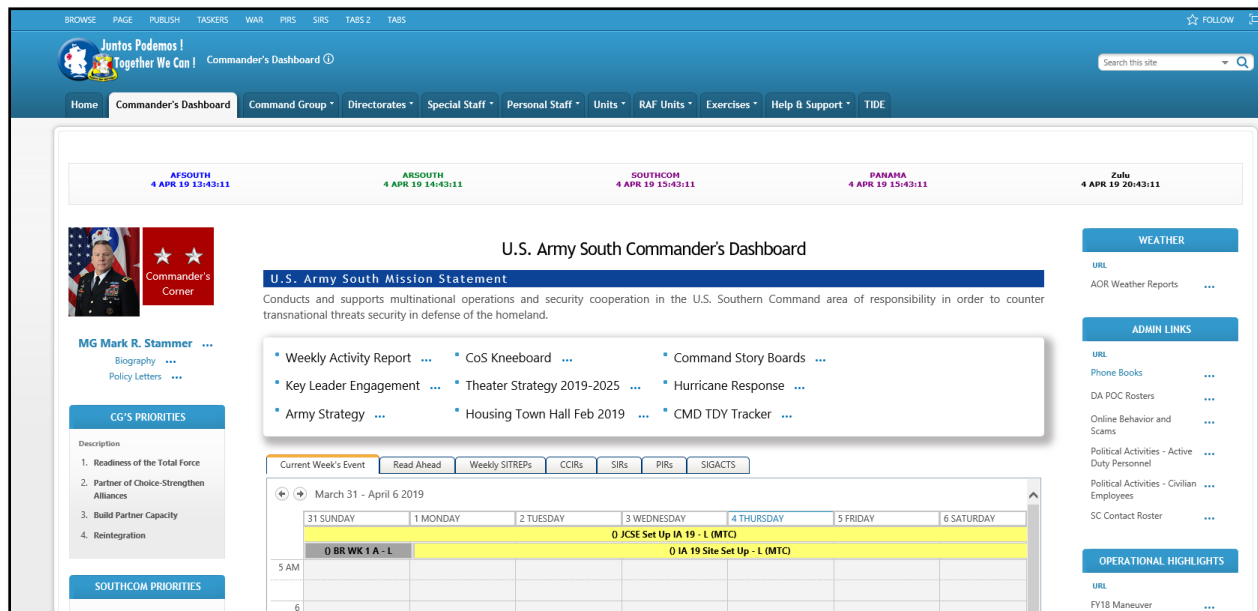


Figure 5. Newly Developed U.S. Army South Commander's Dashboard

- Conducted knowledge management representative (KMR) collaboration tool training and provided appropriate permissions. To minimize the portal account approval time, training was provided which gave each KMR permission to



add/remove personnel from their site. They also received permissions to manage their specific directorate content in lieu of submitting a service request.

Long-term initiatives:

- Implemented the Defense Information Systems Agency (DISA) Purebred program. This allows personnel to enroll in the program. Program stores digital certificates on DISA servers. Additionally, it enables mobile device users to send and read encrypted emails, authenticate to .mil websites, and to sign portable document format (PDF) documents. This is considered more of a long-term initiative because the ultimate goal is to minimize sending of emails with huge attachments. In lieu of sending the attachments, we recommend the sender upload the document to the portal and send an email with the link to the document. All U.S. Army South personnel having a government mobile device are now able to click on the link and access documents, even if they are out of the office.
- Storing the most relevant information on the portal and archiving of any document older than two years to the organization's shared drive. This initiative allows for faster searching and retrieval of operational relevant information on the portal and accessibility of historical information from the shared drive. Previously, directors and action officers stated challenges with finding previously developed documents and having to recreate documents used during previous exercises. The content management procedures were implemented to minimize, if not eliminate, this challenge. To manage storage space, each directorate KMR is required to review and evaluate their section's information during U.S. Army South's annual digital clean-up week. KMRs are now retaining documents in accordance with published policies and regulations.

**Insight Vignette:** If there's no legal requirement to retain specific documents, only the most current and relevant documents are retained and archived on the shared drive.

- Worked in conjunction with our higher headquarters to improve information flow and access to collaboration tools. This exchange improved and streamlined the account request process. Moreover, this collaboration mitigated challenges to accessing their portal. Mutual efforts led to more effective and efficient knowledge sharing and transfer.

### **Conclusion**

It is critical for a unit's KMO to be at battle rhythm events, exercises, and operations. This will ensure KM's relevance, sustainability, and foster future vision. Key is to actively listen and observe for information gaps or knowledge challenges. The KM team must

also stay abreast of technological enhancements and innovative methods that can be leveraged to streamline information flow for the Commander.

Understanding and conceptualizing what KM means and what it does for the organization equals operationalizing this capability. Operationalizing KM is broader than merely understanding the technical aspects of information technology. It demands the KM team to translate this technical jargon into operational language and business practices that leaders can relate to.

Success is when both the Commander and Soldier understand how KM enables the organization's mission and objectives. Taking this into account, implementing KM information and best business practices entails it be repackaged to fit your organization's culture and organizational construct.

**Insight Vignette:** KM is the synergy of the art and science of efficient information-sharing and effective decision-making. The KMO must internalize the methodology and ensure the strategy supports their organization's people, processes, and tools.

