

Open RFP – Social Knowledge Management Federator (SKMF)

Issued by: Craig Wilkey

On behalf of: Frustrated ITSM Professionals Everywhere

Social Knowledge Management Federator (SKMF) by Craig Wilkey is licensed under a

[Creative Commons Attribution-ShareAlike 3.0 Unported License.](#)



Introduction & Justification

As a general rule, I am not fond of ITSM tool-suites. A critical element for establishing a successful toolset strategy is to define the processes & inter-process workflow to best suit the organizational structure and cultural considerations of your enterprise operating environment – **THEN** either find tools designed to meet those requirements with as little customization as possible -or- build to suit. Michael Cardinal sums this up simply and elegantly as “No Tools Before the Rules!” – I have long referred to this as “The Cardinal Rule” of toolset strategy, in Michael’s honor.

Every organization is unique and the approach to establishing an ITSM strategy should be to consider those factors that make your organization unique in order to capitalize & enhance the individual strengths – as opposed to striving toward homogenization and mediocrity. This is the very core of ITIL.

It’s difficult enough to find the right best in breed point-solution for a single process, if an ITSM organization genuinely strives to maintain process integrity. That difficulty grows exponentially if the organization attempts to match multiple processes to the solutions available in a single tool suite.

There is another, perhaps the most significant, aspect of this equation: ITSM is not a “Big-Bang Implementation”. Not only does essentially every organization introduce a Service Management perspective into their culture over a period of time, but the maturity of the various Service Management processes are necessarily interdependent, and will therefore change over time. Since it is quite impossible to develop into a mature Service Management organization without supporting tools, an organization must have a flawless ITSM roadmap, stretching out multiple years, with a very specific, comprehensive project plan, for its entire suite of processes before launching the first process implementation.

Without some truly extraordinary precognition on the part of the vendor, client, and/or product, tool-suites run directly against the grain of all tool selection wisdom. I’ll call this, “The Cardinal Paradox”.

While tools can certainly be customized to a certain extent (process maturation absolutely dictates at least some level of customization as a non-negotiable requirement) using a tool-suite invites either customization to an untenable degree or, much worse, adjusting processes to match the capabilities & limitations of the tools.

The very nature of a pre-packaged tool-suite necessarily implies the greater suitability of a collection of specifically targeted point solutions.

The point solution strategy, of course, reveals an entire set of challenging integration considerations and hurdles. These considerations and hurdles form quite a compelling argument for following a tool-suite strategy – the only argument for a tool-suite, in my view, but that single point is strong enough to stand firmly against all the above considerations.

If the point solution integration hurdles were removed, I see nothing barring realizing the fruition of “The Cardinal Rule”. The SKMF renders the integration considerations relatively moot.

In addition to avoiding “The Cardinal Paradox” the SKMF can serve as the entry point and core of a comprehensive Social Enterprise enabler – with capabilities far beyond what is commonly offered in the current marketplace – billed as Enterprise 2.0 software.

Finally, the seamless integration and correlation of ITSM toolset data with operational data, business information, periphery information and social knowledge will enable a level of information sharing and knowledge generation at least on par with the elusive “Service Knowledge Management System” in an extraordinarily attainable model.

Agnostic Active Integration

The most common approach data federation tools take is one flavor or another of passive, read-only data collection. Pretty much all of these allow some level of data structure and format manipulation once it has been collected. Some of them allow for augmentation of data within the new structure, but they are generally not designed to enable editing of source data or generating new content. They pull data in to organize it in a way that enables much greater data manipulation, reporting and knowledge discovery capabilities.

SKMF is different...

At the core of the SKMF lies a central data transfer and workflow management hub. The role of this hub is to act as an active data transfer and workflow management engine. This central hub serves as an agnostic, active tool integrator, allowing centralized management of specialized, targeted point solutions.

With implementation of an SKMF, a Service Management organization can install any tool that meets the two, simple minimum requirements of open data access and open workflow access (through a comprehensive, published API set). The SKMF would allow seamless transfer of data between many disparate tools, databases and file formats through data connectors. In addition to the data integration, the SKMF will offer centrally managed workflow configuration – I like to think of it as a learning universal remote for the enterprise. An open workflow management platform will allow, for example, an organization to trigger the generation of a record in the incident management tool when an alert is generated in a monitoring tool and triggering an escalation scenario in the contact management tool while simultaneously searching the knowledge base management tool for relevant articles... vendor agnostic, centralized management of process & tool integration.

An affordable, agnostic integration tool also puts the tight integration capabilities of the larger suites within reach of smaller organizations.

Knowledge Generation & Delivery

ITIL guidance on the scope of Knowledge Management amounts to little more than, “This is the process responsible for maintaining the Service Knowledge Management System.”

The vast majority of Knowledge Management tools available on the market are essentially document management applications – some of them with a bit of social networking thrown in for good marketing. Most of the best in breed solutions will also toss in an enterprise search engine.

We can do better – we have to do better.

Effective knowledge base article management is a crucially important capability for the service desk. With what we are capable of today in data visualization, data mining, dynamic data correlation, in-process data cube manipulation, business information management and so many other fields that can augment knowledge delivery, limiting knowledge management to such a scope is a travesty.

Knowledge Management is so much more than allowing users to search multiple databases and returning content based on those searches. The direction of the discipline makes me want to rename “Knowledge Management” to “Knowledge Base Management”. We can relegate Knowledge Base

Management strictly to the management of a service desk knowledge base and build a brand new process called “Knowledge Generation & Delivery”. We should be striving to generate knowledge through data correlation and pushing that knowledge out to where it’s needed, when it’s needed – not simply consolidating search results and allowing people to vote on the quality of this article or that link.

Knowledge Generation & Delivery has a cyclical, synergistic relationship with the other ITSM processes and that relationship must have clear central leadership.

The maturity of Knowledge Generation & Delivery is constrained by the maturity of the rest of the processes – in that without having a comprehensive view of the processes that create the data, the capability to transform that data into reliable information will necessarily be limited.

At the same time, the maturity of the rest of the processes will be limited the maturity of Knowledge Generation & Delivery.

One of the greatest values of Knowledge Generation & Delivery is that its maturation (relative to the rest of an organization’s ITSM processes) will arm the organization with the tools to further the evolution of its other processes.

Maturity in Knowledge Generation & Delivery is the bedrock of ITSM, and as such, the integrity of your information matrix must be centrally managed at the strategic level.

Knowledge Generation & Delivery should pull from, combine and, in turn, enhance:

- Knowledge Base Management
- Business Information Management
- Customer Relationship Management
- Event Correlation
- Data Correlation
- Data Visualization
- Dynamic Trend Analysis
- Dynamic Risk Analysis
- Predictive Alerting
- Portfolio & Service Catalog Management
- Financial Management
- Demand, Capacity, Security, Availability & Continuity Management
- The list goes on and on...

SKMF offers three layers of knowledge content:

- **Cold, Hardened Facts Layer**

Pre-defined, structured, accepted, vetted content, serving as the central trusted source for trusted metrics & report generation across the enterprise

- **Dynamic Knowledge Generation Layer**

Cold, Hardened Facts Layer, along with additional dynamic environment and operational data (such as CI state, alerts, etc) and periphery information to be used for ad-hoc knowledge delivery

- **Fuzzy Knowledge Layer**

The Dynamic Knowledge Generation layer, further augmented by social integration, information sources external to the organization and dynamic information analysis methodologies

Each of these knowledge layers have their own capabilities, constraints and applications.

I can fully appreciate being a skeptic regarding the feasibility (and/or value proposition) of building a functional Service Knowledge Management System, but it is not necessary to build a fully-fledged SKMS (or even a true CMS) to attain quality Knowledge Generation & Delivery.

I have no intention of promoting (or deriding, for that matter) any vendor by name in this document, but there are some vendors making enormous strides in ad-hoc data & information analysis from multiple sources – at least one of them including *entirely unstructured data sources*. I do, however, intend on doing all I can to ensure executive leadership at those vendors receive a copy of this open RFP.

Social Enterprise

I see two fatal errors as I watch the Social Enterprise movement develop and continue to build steam...

The first error can be pinned squarely on the vendors. The vast majority of what I've seen available on the market, amounts to little more than collaborative micro-blogging suites. There is some undeniable value in enabling more streamlined communication and collaboration across the enterprise, and as the size and geographic distribution of an organization increases, the value increases right along with it – perhaps at an even greater rate. We are, however, capable of so much more than that. The potential – the promise – of the Social Enterprise is to nimbly slip through antiquated, ineffective, inefficient bureaucratic structures to empower the intelligent, creative employees whose talents, tragically, often get lost in the machinery.

Some people's talents lie in managing people – but, in my experience, most managers have little talent for managing people. The reason people clamor for promotion in larger organizations is because that's the only way they can see to achieve the level of ownership and engagement that's generally only possible in senior management roles, or in smaller organizations. Of course the money doesn't hurt, but it's not nearly as important as some make it out to be.

People want to use their talents they've worked so hard to develop. People want to grow, through challenging their limitations. People enjoy working for smaller organizations because they want to take pride in ownership of an organization they help build and steer. People want to contribute and be recognized for their contributions. **People want to matter.**

Implementing a glorified chat suite with a timeline-based activity stream is simply not going to do that. Implementing a comprehensive social abstraction layer that enables socially aware functionality on every object within a central knowledge structure and integrating that with comprehensive Knowledge Generation & Delivery just may.

I currently follow 134 people on Twitter. If I step away from my stream for just an hour, there is a lot that slips by me. If that is extended to a medium or larger organization the stream becomes wholly unmanageable and rather pointless. Of course a user can limit the stream to specific people/groups/subjects, but that defeats much of the social purpose, in my view – discovery. There is a place for timeline-based view – within an appropriately limited scope – but delivery of massive quantities of information in an unstructured, scrolling ticker is absurdly useless.

While typical Knowledge Management implementations have the problem of forcing users to go out and scour for what they want, Enterprise 2.0 has the opposite problem of noise overload inflicted upon them. Both have the same result on the user – lack of quality information delivery.

Without comprehensive integration with critical Knowledge Generation & Delivery, and a user-friendly, navigable, topic-based delivery interface – “Enterprise 2.0” is still just chat.

I continue to witness another destructive force in the Enterprise 2.0 space... Of those organizations who are implementing some level of social collaboration infrastructure, senior management perspective tends to be one of either simply enabling more efficient collaboration, or some form of

internal crowd-sourcing. They are continuing to follow the far-too-typical-by-now narrow-minded, short-sighted bottom lining.

A well-designed Social Knowledge Generation & Delivery tool, implemented with an open, transparent, constructive policy, can unlock the vast potential lying dormant in every larger organization and forge a path toward an Egalitarian Meritocracy – Peter Principle be damned!

The great beauty of an Egalitarian Meritocracy is not that it benefits the organization by discovering apt leadership or that it benefits the members through offering otherwise unattainable opportunity – it strikes a symbiotic synchronicity between the two and benefits the whole in a much more profound way than the parts ever could alone.

The great potential of the Social Enterprise is not simply efficiency – it's energy – it's engagement – it's a voice – it's empowerment.

The great promise of the Social Knowledge Generation & Delivery is not chat – it's personhood.

Culmination

Being the central data hub for ITSM tools, along with having the ability to gather & update data from any open source, makes the SKMF the ideal candidate for building data relationships (both structured and ad-hoc) enabling knowledge discovery, serving as the foundation for truly comprehensive Knowledge Generation & Delivery, and providing an ideal integration point for Social Enterprise integration.

Combining tight integration of data and workflows for point solutions with appropriate delivery of multiple-layered knowledge and the collaboration & knowledge sharing potential of a socially enabled infrastructure not only enables organizations to select the ideal solution to support each process, it also allows us to take one step closer toward empowering our employees to realize their full potential and grant them ownership in the organization.