

rate activities? How will privacy and security concerns be addressed? How will quality control be implemented? What additional training will be required for employees and management, and at what direct and indirect cost? Similarly, of the hundreds of enabling technology solutions, which are most appropriate and affordable?

Exactly how internal fact finding is carried out depends on the culture and size of the corporation. For example, external fact finding through site visits can help facilitate external data gathering and provide the implementation team with a perspective on exactly what is involved day-to-day in an implementation effort. Sending a corporate representative to attend seminars, networking with colleagues in other businesses, and working with consultants also can facilitate external fact finding. Regardless of the approach used, for implementation to move past the fact-finding phase into a formalized approach, senior management must be fully behind the initiative. This is true whether the motivation for a KM implementation is to increase profitability, to provide higher-quality service, or to transform the corporation into a learning organization.

Formalize the Approach

The third phase of the Knowledge Management implementation process involves formalizing the approach—that is, developing a comprehensive plan—based on ad hoc experiences and the results of fact-finding. One of the key tools at this phase of implementation is the request for proposal, which documents much of the internal strategic planning. For example, the RFP defines the functional and requirements specifications for any technologies involved in the implementation. These include definitions of the operational constraints of technology, such as hardware and software requirements, in terms of performance and standards.

A formalized approach includes details on project management, including resource management, time lines for technology infrastructure