

# **MODULE ONE BUSINESS ETHICS & KNOWLEDGE MANAGEMENT**



## **NQF 5 PORTFOLIO OF EVIDENCE**

<b>LEARNER DETAILS</b>	
<b>Name</b>	<input type="text"/>
<b>Surname</b>	<input type="text"/>
<b>ID Number</b>	<input type="text"/>
<b>Group code/name</b>	<input type="text"/>

**NATIONAL CERTIFICATE : GENERIC MANAGEMENT  
STRATEGIC MANAGEMENT, LP #74512 / SQI #59201  
NQF LEVEL 5**

**MODULE ONE  
BUSINESS ETHICS AND  
KNOWLEDGE MANAGEMENT**

**PORTFOLIO OF EVIDENCE**

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## LEARNER DECLARATION OF AUTHENTICITY

I,

(name and surname)

agree to, and will abide, by the following conditions...

- 1) I will complete all documentation as required.
- 2) All activities and tasks will be completed to the best of my abilities.
- 3) All the work I submit will be my own work.
- 4) I can only be credited for the unit standards in this module if I hand in my workbook within the specified time frame.
- 5) Should I lose this workbook, I will cover the costs to replace it and will redo all my work. I will arrange with the facilitator how to do this.
- 6) I will comply with the skills development provider's learner code of conduct.

**Learner signature**

**Date**

## UNIT STANDARDS : AN OVERVIEW

Unit Standard ID		Title	NQF Level	Credits
Fundamental	252042	Apply the principles of ethics to improve organisational culture	5	5
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Demonstrate understanding of the relationship between values, ethics and organisational culture and its impact on achieving goals and objectives.</li> <li>2. Apply the concept of corporate ethics to a unit.</li> <li>3. Analyse a unit in relation to the principles of corporate ethics.</li> <li>4. Formulate recommendations for strengthening shared organisational values, the code of conduct and ethical practices.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Elective	264400	Apply the principles of corporate governance and ethics in a function	6	5
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Determine own accountability in respect of corporate governance.</li> <li>2. Develop processes for operationalising the corporate governance policy of the entity within the function.</li> <li>3. Evaluate the adherence to corporate governance in the function.</li> <li>4. Develop a plan to improve compliance to corporate governance.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Core	252044	Apply principles of knowledge management	5	6
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Demonstrate knowledge and understanding of the concepts and components of knowledge management.</li> <li>2. Analyse a unit according the entity's knowledge management policies and procedures.</li> <li>3. Develop a knowledge management implementation plan for a unit.</li> </ol>				
Unit Standard ID		Title	NQF Level	Credits
Elective	264405	Manage the information and institutional knowledge within a function	6	5
<b>Specific outcomes</b> <ol style="list-style-type: none"> <li>1. Develop a framework for creating, sharing, capturing and protecting management information and institutional knowledge.</li> <li>2. Develop a process for promoting information and knowledge management in the function.</li> <li>3. Evaluate the processes and practices relating to information and knowledge management.</li> <li>4. Develop an action plan to address gaps in information and knowledge management processes and practices.</li> <li>5. Implement a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets.</li> </ol>				

## EXIT LEVEL OUTCOMES

1. Initiate, develop, implement and evaluate operational strategies, projects and action plans so as to improve the effectiveness of the unit.
2. Monitor and measure performance and apply continuous or innovative improvement in the unit.

## ASSOCIATED ASSESSMENT CRITERIA

- Priorities are identified by considering a broad range of factors in solving problems and making decisions on operational strategies.
- The need for and the benefits of change are explained and recommendations are made to achieve intended results.
- The initiatives to be undertaken by the unit are linked to organisational goals and objectives.
- Operational strategies, projects and action plans are initiated and developed.
- Operational strategies, projects and action plans are implemented and evaluated.

## ASSOCIATED ASSESSMENT CRITERIA—ELO 2

- The performance of the teams and the unit is monitored and measured according to entity's systems and procedures.
- Innovative and/or continuous improvement strategies are applied according to generally accepted theory and practice.
- Results are evaluated in relation to intended outcomes

## CRITICAL CROSS-FIELD OUTCOMES (INTEGRATED)

Identify and solve problems using critical and creative thinking processes...

- In applying ethical principles in the unit.
- When...
  - Developing processes for operationalising the corporate governance policy of the entity within the function.
  - Evaluating the adherence to corporate governance in the function.
  - Developing a plan to improve compliance to corporate governance.
- In which responses show that responsible decisions using critical and creative thinking have been made in relation to managing knowledge in a unit.
- In which responses display that responsible decisions using critical and creative thinking have been made when...
  - Developing a framework for creating, sharing, capturing and protecting management information and institutional knowledge.
  - Developing a processes for promoting information and knowledge management in the .
  - Evaluating the processes and practices relating to information and knowledge management.
  - Developing an action plan to address gaps in information and knowledge management processes and practice.
  - Implementing a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets.

Work effectively with others as a member of a team, group, organisation or community...

- To improve the culture of the unit.
- During the development processes for operationalising the corporate governance policy of the entity within the function.
- In promoting sound knowledge management practices in a unit.
- When...
  - Evaluating the processes and practices relating to information and knowledge management.
  - Implementing a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets.

Organise and manage oneself and one's activities responsibly and effectively...

- In order to demonstrate ethical conduct.
- When...
  - Developing processes for operationalising the corporate governance policy of the entity within the function.
  - Evaluating the adherence to corporate governance in the function.
  - Developing a plan to improve compliance to corporate governance.
  - Managing the knowledge in a unit.
  - Developing a framework for creating, sharing, capturing and protecting management information and institutional knowledge.
  - Developing a processes for promoting information and knowledge management in the function.
  - Evaluating the processes and practices relating to information and knowledge management.
  - Developing an action plan to address gaps in information and knowledge management processes and practice.
  - Implementing a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets.

**continued...**

Collect, analyse, organise and critically evaluate information in order to...

- Identify areas of unethical conduct in the unit.
- Better understand and explain own accountability in respect of corporate governance.
- Manage the knowledge in a unit.

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion...

- To promote ethical conduct in the unit.
- When...
  - Developing processes for operationalising the corporate governance policy of the entity within the function.
  - Evaluating the adherence to corporate governance in the function.
  - Developing a plan to improve compliance to corporate governance.
  - In communicating with team members in relation to managing the knowledge in the unit.
  - Developing a framework for creating, sharing, capturing and protecting management information and institutional knowledge.
  - Developing a processes for promoting information and knowledge management in the function.
  - Evaluating the processes and practices relating to information and knowledge management.
  - Developing an action plan to address gaps in information and knowledge management processes and practice.
  - Implementing a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets

Use science and technology effectively and critically, showing responsibility to the environment and health of others in promoting ethical practices in the unit and entity.

Demonstrate an understanding of the world as a set of interrelated systems by recognising that...

- Mathematical problem-solving contexts do not exist in isolation to demonstrate how personal, social, organisational and national values and beliefs impact on the entity's culture.
- Problem-solving contexts do not exist in isolation in applying knowledge of and insight into the complexity of managing knowledge.

Participate as responsible citizens in the life of local, national and global communities by promoting ethical practices in the unit and entity.

## FORMATIVE ACTIVITIES

### **US252042: Apply the principles of ethics to improve organisational culture**

**SO1:** Demonstrate understanding of the relationship between values, ethics and organisational culture and its impact on achieving goals and objectives. ACs 1-3

**SO2:** Apply the concept of corporate ethics to a unit. AC3

**SO3:** Analyse a unit in relation to the principles of corporate ethics. ACs 1-3

**SO4:** Formulate recommendations for strengthening shared organisational values, the code of conduct and ethical practices. ACs 1-4

### **US264400: Apply the principles of corporate governance and ethics in a function**

**SO2:** Develop processes for operationalising the corporate governance policy of the entity within the function. AC7

## FORMATIVE ACTIVITY 1: PERSONAL VALUES, ORGANISATIONAL VALUES, CULTURE AND ETHICS

1. Scan the QR code below to complete the questionnaire to help you understand your personal values before your first session.



Link:

<https://www.psychologytoday.com/za/tests/personality/values-profile>

- 1.1. Discuss the concept of personal values.

- 1.2. List three (3) personal values and explain why these are important to you.

Personal value 1:



1.2. List three (3) personal values and explain why these are important to you. (**continued**)

**Personal value 2:**

**Personal value 3:**

1.3. Explain, using an example from your own life, how personal values influence ethical behaviour.

2. Employees are unique, and their personal values are understood as being individualised. These same employees are required to participate in organisational life where they need to respect and follow collective or shared organisational values.

2.1 Discuss the concept of organisational values.

2.2. Explain four (4) examples of organisational values in your organisation.

**Example 1:**

**Example 2:**

**Example 3:**

**Example 4:**

2.3 Explain what you as a strategic manager should keep in mind when aligning personal values with organisational values.

3. Organisational values, along with other characteristics, inform organisational culture.

3.1 Discuss the concept of organisational culture.

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3.2 Explain three (3) **examples** that demonstrate the organisational culture in your workplace.

**Example 1:**

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**Example 2:**

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**Example 3:**

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4. The qualities of a great organisational culture are alignment, appreciation, trust, integrity, performance, resilience, teamwork, innovation, and psychological safety.

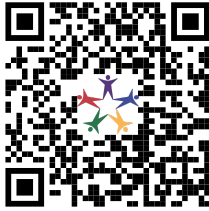
4.1 Explain, using examples, the qualities of a great organisational culture that are present in your team.

4.2 Explain, using examples, the qualities of a great organisational culture that need to be developed in your team, and why.

5. According to Quartz at Work “getting corporate culture right isn’t a feel-good initiative. It’s a business imperative.”

5.1 Explain in detail why you think understanding organisational culture is required for strategic managers to achieve goals and objectives.

6. In South Africa and abroad, Unilever is recognised as a leading organisation in the achievement of the Triple Bottom Line (TBL) theory. The Unilever Sustainable Living Plan is an example of this. Scan the QR code below to watch this organisation's online video 'Making Sustainable Living a Common-place for 8 billion People' before answering the following questions:



Link:

[https://www.youtube.com/watch?v=lf7\\_R6SFf7k](https://www.youtube.com/watch?v=lf7_R6SFf7k)

6.1 Define the concept of organisational or corporate ethics.

6.2 Identify evidence of the definition of organisational ethics put into practice in this Unilever (2020) Sustainable Living Plan online video.

7. Discuss the Triple Bottom Line (TBL) theory **and justify** if there is evidence of the implementation of this theory in your own organisation. \*Remember to cover all the Ps\*

8. As the Strategic Manager you are working approved overtime on a deadline with the team, finishing at 7pm. While everyone is packing up you see a team member walking towards the printer, she picks up a ream of paper, and places it in her bag.

You approach her and ask her what is she doing?

She said that because they were working late tonight, she didn't have the time to go to the shop after work. She explained further that her daughter has her final school project due tomorrow morning. Her daughter phoned her and said that there is no paper left at home to print her project. Your team member said that she must take this paper so that her daughter doesn't miss her deadline and fail the project.

- 8.1 Define an ethical dilemma and explain why this above scenario is an ethical dilemma.

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- 8.2 Of the seven principles of ethical leadership, which two principles would you as a strategic manager apply in the question 8 scenario to help you make the best possible decision. Explain your reasoning for each.

<b>Principle 1:</b>
<b>Principle 2:</b>



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graph LR
    A[Describe Issue] --> B[STEP 1]
    B --> C[STEP 2]
    C --> D[STEP 3]
    D --> E[STEP 4]
    B --> B1[ ]
    C --> C1[ ]
    D --> D1[ ]
  
```

- 9 There are four (4) Acts, regulations and reports that influence the content and strengthening of organisational codes of ethics and conduct in the public and private South African organisational context. One of these that applies to both sectors is the King IV Report.

9.1 In one paragraph of approximately 200 words explain the **King IV Report**.

9.2 Provide one (1) recommendation to your organisation to help achieve one (1) of the purposes of the King IV Report.

- 10 As a strategic manager in a leadership position, discuss how you would go about promoting/communicating ethical behaviour and good conduct to your team members.

## INTEGRATED SUMMATIVE TASKS

To be performed in own time and/or at the workplace.

US252042: Apply the principles of ethics to improve organisational culture

### INTEGRATED SUMMATIVE TASK 1

#### ORGANISATIONAL VALUES, CULTURE, ETHICS AND CONDUCT

1. Obtain a copy of the Code of Ethics OR Code of Conduct at your organisation. Create a professionally written report using the following format:
  - Title
  - Summary
  - Introduction
  - Body
  - Conclusion
  - Recommendations
  - Appendix or Appendices
- 1.1. In your report, you are required to differentiate between a code of ethics and a code of conduct and use this to identify the type of document you have selected.
- 1.2. Evaluate if this document is aligned to your organisation's values and culture.
- 1.3. Offer possible suggestions or recommendations to improve or not improve the strengthening of shared organisational values in this code of ethics/conduct, and why.
- 1.4. Include a copy or link to this document in an appendix at the end of the report. For example:  
Appendix a: Code of Ethics at ABC Organisation.

#### **IMPORTANT:**

Attach your knowledge management implementation plan in either Microsoft Word format or Acrobat PDF and submit with this formative assessment.

You will label this “**Name Surname\_SM5 M1\_IS Task 1**”.

**US264400: Apply the principles of corporate governance and ethics in a function**

**SO1:** Determine own accountability in respect of corporate governance. ACs 1-3.

**SO2:** Develop processes for operationalising the corporate governance policy of the entity within the function. ACs 1, 4-6.

**SO3:** Evaluate the adherence to corporate governance in the function. ACs 1-4.

**SO4:** Develop a plan to improve compliance to corporate governance. ACs 1-3.

**US252042: Apply the principles of ethics to improve organisational culture**

**SO2:** Apply the concept of corporate ethics to a unit. AC 2.

**FORMATIVE ACTIVITY 2: CORPORATE GOVERNANCE**

1. South Africa has seen a succession of corporate governance scandals in the private and public sector in recent years. Each of these cases has highlighted an unacceptable lack of ethical behaviour. Tongaat Hulett, Eskom, and New Age to name a few.

- 1.1. Discuss the concept of corporate governance.

- 1.2. Provide one example of corporate governance in your organisation.

- 1.3. In a table, differentiate between good and poor corporate governance, and describe a South African organisation's example to demonstrate the difference between both.

Good Corporate Governance	Poor Corporate Governance



The reduction of the 75 King III principles to 17 in King IV indicates a more focused and streamlined approach to sound corporate governance. The fact that the principles build on and reinforce one another is very useful and will make a big contribution to a more integrated approach to corporate governance.

- 1.3. Keeping in mind the above companies' involvement in negative scandals, explain why you think corporate governance is important to your organisation and to you as an employee within this organisation?



While King III highlighted the “triple context” of the economy, society and the environment, King IV goes further to suggest that these three components should not be separate issues, but rather be combined to leverage its impact as an Integrated whole or intertwined concept.

2. Using another programme or application create an organogram or organisational chart and save it as an image file (jpg or png) to show your understanding of the structure of corporate governance within your organisation. If there is no Board of Directors in place, then use the CEO, CFO, COO etc. Ensure the image is clear and all text is legible.

Attach your image of the organogram structure of corporate governance below using the Qr code or link below. The process of inserting an image is simple and is explained in a video on the site. Once you are happy with the placement, size and legibility of the document – download it. Once you have read the write-up, click on the **go to** tool.



<https://smallpdf.com/blog/insert-image-into-pdf>

QR scan image to access the site directly on you tablet



The website smallpdf.com only allows you to work with two documents per day – so plan yourself well. When a document is open – you can download it multiple times and continue editing as long as the page with the uploaded document is not closed.

### INSERT YOUR ORGANOGRAM STRUCTURE OF CORPORATE GOVERNANCE BELOW

INSERT YOUR IMAGE HERE. ENSURE THE WRITING IS LEGIBLE

The image of your organogram can be inserted above, and below you may give your assessor an explanation of anything that requires clarity.



3. Explain the purpose and benefits of corporate governance policies and give examples of the application in your function.

**Purpose of corporate governance**

**Example/s in your function**

**Benefits of corporate governance**

**Example/s in your function**

4. Explain the **four (4) basic principles of corporate governance** in detail and explain your contribution as a strategic manager in achieving each principle.

**Principle 1:**

**Contribution as a manager to achieve this principle**

**Principle 2:**

**Contribution as a manager to achieve this principle**

4. Explain the four (4) basic principles of corporate governance in detail and explain your contribution as a strategic manager in achieving each principle ... **continued.**

**Principle 3:**

**Contribution as a manager to achieve this principle**

**Principle 4:**

**Contribution as a manager to achieve this principle**

5. According to Stats SA 'Business Impact Survey of the Covid-19 Pandemic in South Africa', the Covid-19 pandemic has created major concerns for business and society in South Africa. With your organisation, the fiduciary duties of the Board of Directors, the principles of corporate governance, and the impact of Covid-19 in mind:

5.1 Discuss if corporate governance should be or should not be reshaped.

5.2 Provide reasons for your response.

6. Explain what processes (minimum of two) you would implement as a strategic manager to put the corporate governance policy of your organisation in to practice in your function.

**Process 1:**

**Process 2:**

**Process 3:**

**Process 4:**



**Strategic Management - Start with a Core Team**

“Begin by building a team to own the process and ensure there is representation from all key areas of the organisation. Incorporating different perspectives makes it easier to implement and disseminate the strategic plan once it is created. The team must be heard, invested in the process, and agree to goals upfront or the plan will not get adopted.”

## INTEGRATED SUMMATIVE TASKS

To be performed in own time and/or at the workplace.

**US264400: Apply the principles of corporate governance and ethics in a function**

### INTEGRATED SUMMATIVE TASK 2

#### ASSESS AN EXISTING CORPORATE GOVERNANCE POLICY

1. Obtain a corporate governance policy that is in place at your organisation, if there is no Board of Directors, then use the code of ethics or conduct as a corporate governance guideline.
  - 1.1 In the form of a written report, evaluate the contents of the policy you are using in terms of:
    - 1.1.1 Being adhered to or followed in your function.
    - 1.1.2 Any corporate governance irregularities or deviations (or not).
2. Create an action plan that includes suggestions that you feel will enhance compliance of good governance in your function.

This action plan must include the following:

<input type="checkbox"/>	The action goal
<input type="checkbox"/>	The action step or steps
<input type="checkbox"/>	Responsible department(s) and/or employee/s
<input type="checkbox"/>	Start date
<input type="checkbox"/>	Milestone/benchmark
<input type="checkbox"/>	Due date
<input type="checkbox"/>	Resources required
<input type="checkbox"/>	Desired outcome or result

Cross off (x) each part as you complete it to ensure you meet all requirements.

#### **IMPORTANT**

Attach your written report and action plan in either Microsoft Word format or Acrobat PDF and submit with this formative assessment.

You will label this “**Name Surname\_SM5 M1 IS Task 2**”.

**US252044: Apply the principles of knowledge management****SO1:** Demonstrate knowledge and understanding of the concepts and components of knowledge management. ACs 3,4**SO3:** Develop a knowledge management implementation plan for a unit. AC1**US264405: Manage the information and institutional knowledge within a function****SO1:** Develop a framework for creating, sharing, capturing and protecting management information and institutional knowledge. ACs 2,3**SO 2:** Develop a processes for promoting information and knowledge management in the function**SO5:** Implement a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets. ACs 1-2**FORMATIVE ACTIVITY 3: KNOWLEDGE MANAGEMENT (KM) AND KM SYSTEMS**

1. The United Nations Development Programme (UNDP) releases a global knowledge index measure worldwide. Recently South Africa ranked 71 out of 138 countries identifying South Africa as a moderate performer in the knowledge economy and society globally. This highlights the urgent need for South African businesses, and the strategic managers in these organisations, to not only lead in the contribution towards their organisation's sustainable strategic competitive advantage, but also improve the country's ranking.

- 1.1 Differentiate between information and knowledge, and information management and knowledge management.

Information	Knowledge
Information management	Knowledge management

1.2 Provide one (1) example of information and knowledge management in your business unit or organisation.

Information management example	Knowledge management example

1.3 Differentiate between tacit and explicit knowledge.

Tacit knowledge	Explicit knowledge



1.4. Provide two (2) examples of tacit and explicit knowledge **in your workplace**.

Tacit knowledge	Explicit knowledge
Example 1 in your workplace	Example 1 in your workplace
Example 2 in your workplace	Example 2 in your workplace

1.5 Explain how your business unit's knowledge management example (in question 1.2 above) achieves two (2) purposes, objectives, and key drivers in your business unit.

Knowledge management example achieves these two purposes

- 1.5 Explain how your business unit's knowledge management example (in question 1.2 above) achieves two (2) purposes, objectives, and key drivers in your business unit ... **continued.**

**Knowledge management example achieves these two objectives**

**Knowledge management example achieves these two key drivers**

2. Creating a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets is not without challenges.

2.1 There are eleven (11) KM challenges in the workplace. Identify and discuss only the KM challenges that exist in your team or department.

2.2 Provide an example of how you propose to overcome each KM challenge (identified in question 2.1) in your team or department.

3. As a strategic manager, when developing a knowledge management implementation plan there are important aspects and processes that need to be formulated in the early stages.

3.1 Discuss, in your own words, the four (4) components of knowledge management that need to be considered.

**Component 1:**

**Component 2:**

3.1 Discuss, in your own words, the four (4) components of knowledge management that need to be considered ... **continued.**

**Component 3:**

**Component 4:**

- 3.2. List the key skills required in knowledge management and identify who (employee and job title or department) in your business unit and/or organisation can fulfill each one.

Key skills required in knowledge management	Employee and job title or department who can fulfill each skill

- 3.3. Discuss the key people's **roles and responsibilities** (a few sentences each) to ensure your knowledge management implementation plan is effective and efficiently executed.

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- 3.3. Discuss the key people's **roles and responsibilities** (A few sentences each) to ensure your knowledge management implementation plan is effective and efficiently executed ... **continued**.



3.4. Describe the three (3) dimensions of knowledge management, and explain why you think each dimension creates value and sustains or increases competitive advantage in your organisation.

**Dimension 1:**

**Creates value and sustains or increases competitive advantage in your organisation**

**Dimension 2:**

**Creates value and sustains or increases competitive advantage in your organisation**

**Dimension 3:**

**Creates value and sustains or increases competitive advantage in your organisation**

4. You know that the purpose of effective knowledge management processes is to facilitate improved decision-making, collaboration, discovery, innovation, assessment, application, and enhances internal and external communication and efficiency, and so much more.

Knowing this, your executive management team has approached you to help reduce customer loss in your organisation's contact centre department.

You have been told customers complain that they wait a long time for answers and are transferred to multiple contact centre agents before receiving the answer they are looking for.

4.1 Identify and explain the four (4) typical steps in a knowledge management process.

4.2 Apply these four (4) knowledge management steps to scenario 4 above.

4.3 There are many different theories and models of the knowledge management life cycle, and while each life cycle differs in specific steps, these do share similarities.

Name and explain one (1) of these knowledge management life cycle models and apply each phase in this model to solve scenario 4.

- 4.3 There are many different theories and models of the knowledge management life cycle, and while each life cycle differs in specific steps, these do share similarities.

Name and explain one (1) of these knowledge management life cycle models and apply each phase in this model to solve scenario 4 ... **continued.**

5. You work in a competitive industry where lightning-fast reaction times to market opportunities, fluctuations and changes are critical. Yet, rather than being able to react quickly to what's going on, key employees can't find the information they need fast enough to make important decisions.

- 5.1 With the purpose of a knowledge management system in mind, justify why the organisation in scenario 5 requires a knowledge management system.

- 5.2 Discuss the six (6) benefits of a knowledge management system so that senior management agrees to implement this in scenario 5.

- 5.3 There are different types of knowledge management systems such as Learning Management Systems (**LMS**), Knowledge Centred Systems (**KCS**), Artificial Intelligence (**AI**) Knowledge Management Systems, Customer Relationship Management (**CRM**) Systems, and Content Management Systems (**CMS**).

Motivate a knowledge management system or systems to use in scenario 5.

- 5.4 Explain to the senior management team what knowledge management tools are, what they do, and why they are necessary.

5.5 Discuss the importance of providing users with access to the right KM tools related to scenario 5.

- 6 There are many different types of in-house (internal) or online (external) knowledge management tools. Analyse your department or business unit and identify where there is a need for a knowledge management tool where none currently exists.

You decide to present or pitch your idea to senior management.

Create a presentation plan by answering these three questions:

- 6.1 Explain the need for this knowledge management tool in your department or business unit.

6.2 Name and describe the knowledge management tool you feel is most appropriate for your department or business unit.

6.3 Motivate your choice using the pros and cons of this tool.

Pros	Cons

Motivation



**US252044: Apply the principles of knowledge management**

**SO2:** Analyse a unit according the entity's knowledge management policies and procedures. ACs 1-4

**US264405: Manage the information and institutional knowledge within a function**

**SO3:** Evaluate the processes and practices relating to information and knowledge management. ACs 1-3

**SO4:** Develop an action plan to address gaps in information and knowledge management processes and practices. ACs 1-4

## **FORMATIVE ACTIVITY 4: EVALUATE A KNOWLEDGE MANAGEMENT SYSTEM**

1. In a strategic management role, you are required to analyse, assess and evaluate existing knowledge management systems in your workplace. It is important for you to understand what this entails.
  - 1.1 Differentiate between the term analysis, assessment, and evaluation, and explain a knowledge management example to show your understanding of each.

### **Analysis explanation and knowledge management example**

### **Assessment explanation and knowledge management example**

### **Evaluation explanation and knowledge management example**



- 1.2. Explain the purpose of analysing, assessing, and evaluating a knowledge management system.

- 1.3. Describe three (3) considerations you will need to do to successfully carry out an assessment of a knowledge management system in the workplace.

- 1.4. List the six (6) aspects to consider when analysing, assessing or evaluating your organisation's existing knowledge management system.

2. Metrics can be used to enhance learning, advance business performance and/or achieve objectives. Metrics are also fundamental in knowledge management evaluation and assessment.

2.1 Explain the purpose of metrics in knowledge management.

2.2 Explain the seven (7) metric types.

## 2.2 Explain the seven (7) metric types ... **continued.**

3. You have been tasked with assessing the existing knowledge management systems in your organisation. The knowledge management systems to be evaluated have been grouped in to these seven (7) organisational categories below:

1	Policy and Strategy
2	Human Resource Planning and HR Processes
3	Training and Human Performance Improvement
4	Methods, Procedures and Documentation Processes for Improving Knowledge
5	Technical IT Solutions
6	Tacit Knowledge Capturing/Use
7	Workforce Culture Supporting Knowledge Management

To start thinking about this assessment process, choose one (1) of these seven (7) organisational areas above and answer the following questions:

- 3.1 What organisational area have you chosen to focus on first, and why?

- 3.2 Explain the metrics scoring that you could use.

3.3 Describe how you would develop the knowledge management assessment questionnaire.

3.4 Once you have implemented the knowledge management assessment, you will analyse the data and evaluate the overall scores. The analysis of these scores will help you answer a series of questions.

List any five (5) of the questions that you could ask at this stage.

3.5 The knowledge management assessment report that you will need to compile at the end of this process will depend on your organisation's format and required content.

Outline the standard eleven (11) sections this report can include.

## INTEGRATED SUMMATIVE TASKS

To be performed in own time and/or at the workplace.

US252044: Apply the principles of knowledge management

US264405: Manage the information and institutional knowledge within a function

### INTEGRATED SUMMATIVE TASK 3

#### ASSESSING / ANALYSING / EVALUATING

#### AN EXISTING KNOWLEDGE MANAGEMENT SYSTEM

3. In a team (group) research your business unit or organisation's knowledge management system. Then using an already existing knowledge management assessment tool (you can use the one in your Learner Manual or use one online) do the following:

- 3.1 List your group members (names and surnames).
- 3.2 Identify the knowledge management system.
- 3.3 Explain the purpose of this knowledge management system in your organisation.
- 3.4 Evaluate (strengths and limitations) of this knowledge management system using a knowledge management assessment tool.
- 3.5 For the limitations identified, propose suggestions for improvement.
- 3.6 Include a copy or the url link to the knowledge management assessment tool used.
- 3.7 Record your group's findings in the format of a **presentation**.

#### **IMPORTANT:**

Attach your group's presentation and submit with this formative assessment.

You will label this "**Group 1/2/3 etc SM5 M1 IS3**".

**US252044: Apply the principles of knowledge management**

**SO3:** Develop a knowledge management implementation plan for a unit. ACs 2-4

**US264405: Manage the information and institutional knowledge within a function**

**SO2:** Develop a process for promoting information and knowledge management in the function. ACs 1-4

**SO5:** Implement a culture that empowers staff to seek, develop, share, utilise, protect and store knowledge assets. ACs 3-6

**FORMATIVE ACTIVITY 5: SETTING UP A KNOWLEDGE MANAGEMENT SYSTEM**

1. When implementing a knowledge management system, it is important that this is effective and efficient.

- 1.1 List the three (3) principles to consider when setting up a successful knowledge management system.

**Principle 1:**

**Principle 2:**

**Principle 3:**



1.2 Sonto is a Strategic Manager at AX Solutions a software development company. He wants to set-up a Learning Management System (LMS) for the software developers. He doesn't have much insight about this, so he approaches you for a brainstorming meeting for assistance. You know that in order to ensure the success of his initiative, he needs to focus on four elements in knowledge management set-up.

Following these four elements in knowledge management set-up, offer Sonto practical tips to help him strategise the set-up of his LMS for the software developers at AX Solutions.

**Element 1:**

**Element 2:**

**Element 3:**

- 1.2 Sonto is a Strategic Manager at AX Solutions a software development company. He wants to set-up a Learning Management System (LMS) for the software developers. He doesn't have much insight about this, so he approaches you for a brainstorming meeting for assistance. You know that in order to ensure the success of his initiative, he needs to focus on four elements in knowledge management set-up.

Following these four elements in knowledge management set-up, offer Sonto practical tips to help him strategise the set-up of his LMS for the software developers at AX Solutions.

... continued.

**Element 4:**

2. Knowledge management systems are used in organisations to enhance productivity and support innovation. While we tend to focus on the benefits there are also shortfalls that we want to avoid when setting up a knowledge management system.

Discuss three (3) mistakes to avoid when setting up a knowledge management system.

**Mistake 1:**

2. Knowledge management systems are used in organisations to enhance productivity and support innovation. While we tend to focus on the benefits there are also shortfalls that we want to avoid when setting up a knowledge management system.

Discuss three (3) mistakes to avoid when setting up a knowledge management system  
... **continued.**

#### **Mistake 2:**

#### **Mistake 3:**

## INTEGRATED SUMMATIVE TASKS

To be performed in own time and/or at the workplace.

US252044: Apply the principles of knowledge management

US264405: Manage the information and institutional knowledge within a function

### INTEGRATED SUMMATIVE TASK 4

#### IMPLEMENTING A KNOWLEDGE MANAGEMENT SYSTEM

4. You have been tasked with the responsibility to plan and implement a knowledge management system for your business unit or organisation. To achieve this, you must create a professionally written knowledge management implementation plan.

- 4.1. Develop a **knowledge management implementation plan** that includes the following elements:

Brief background about your business unit or organisation

Goals and objectives

Change management strategy

A foundation

Results of your current state assessment

Core capabilities

Knowledge management implementation team

Knowledge management implementation road map

- 4.2. Explain what you would do to ensure that your knowledge management system remains effective and efficient throughout its life-cycle.

#### **IMPORTANT**

Attach your knowledge management implementation plan in either Microsoft Word format or Acrobat PDF and submit with this formative assessment.

You will label this **Name Surname SM5 M1 IS Task 4**.

E.g.: Sheldon Lee Cooper SM5 M1 IS Task 4