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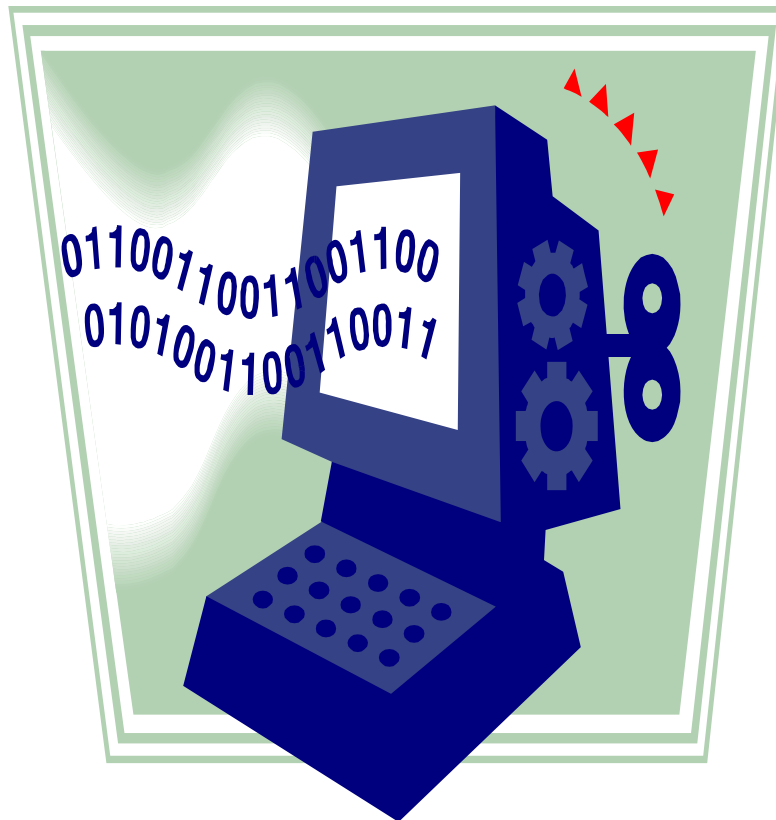
# Selecting a KM Technology Partner; The Key to Success

## Knowledge Management Solutions



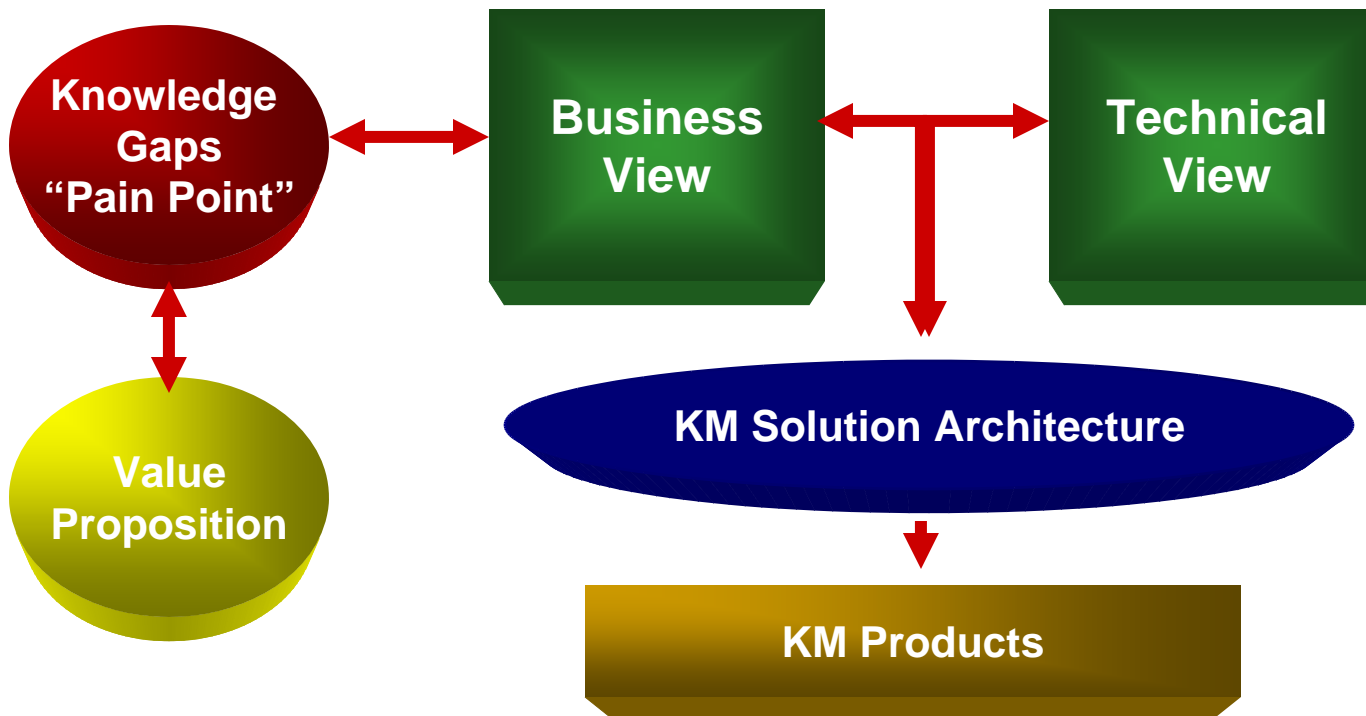
Kevin M. O'Sullivan  
President  
The Knowledge Compass, Inc.

## Session Discussion Points

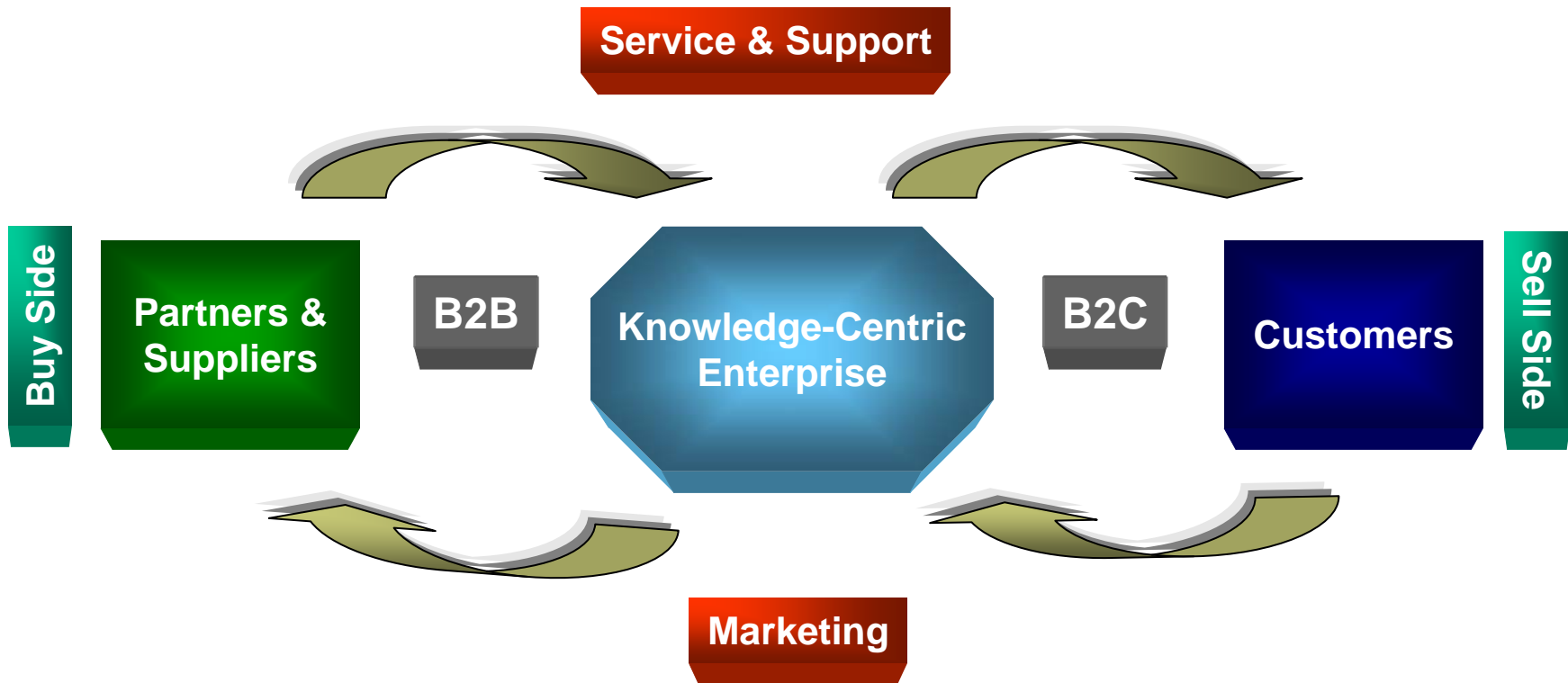


- **The Knowledge-Centric Organization**
- **Knowledge Management (KM) System Architecture**
- **KM Solution Product Components**
- **The Selection Process**
  - **Technology Vendor**
  - **Implementation Partner**

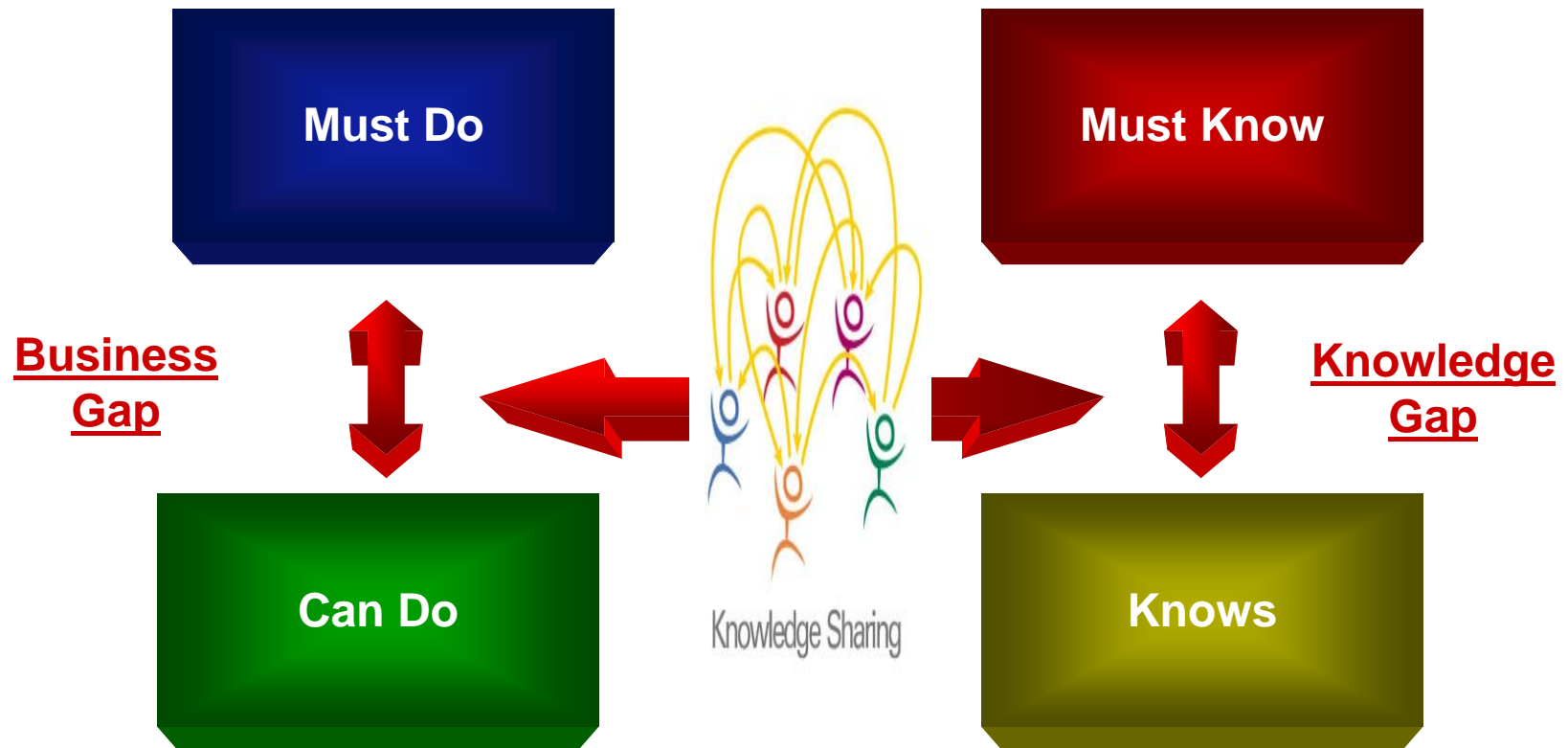
# Setting The Stage



# Knowledge-Centric Organization



# Alignment: The Starting Point



# The Knowledge Audit



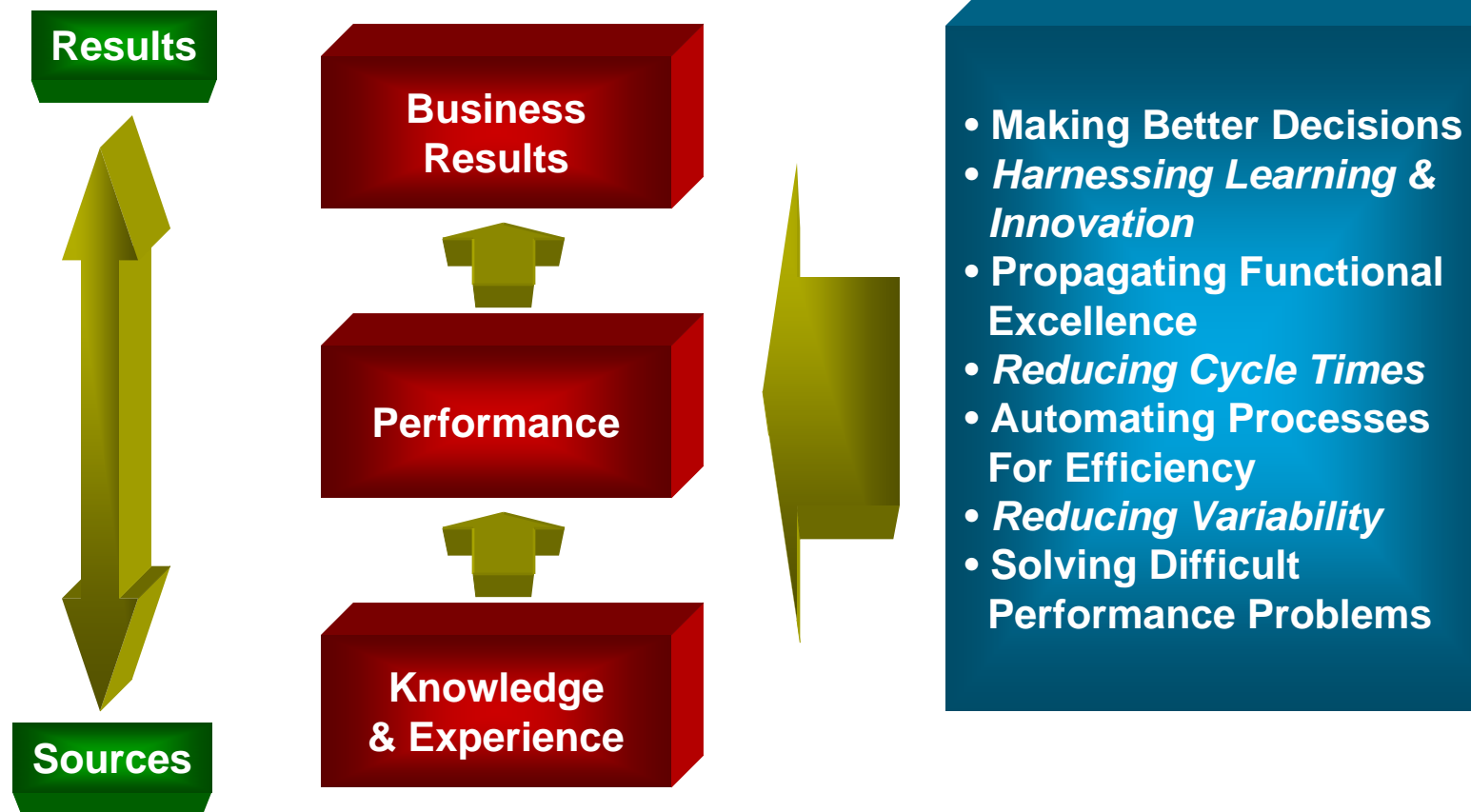


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## Analyzing the Situation





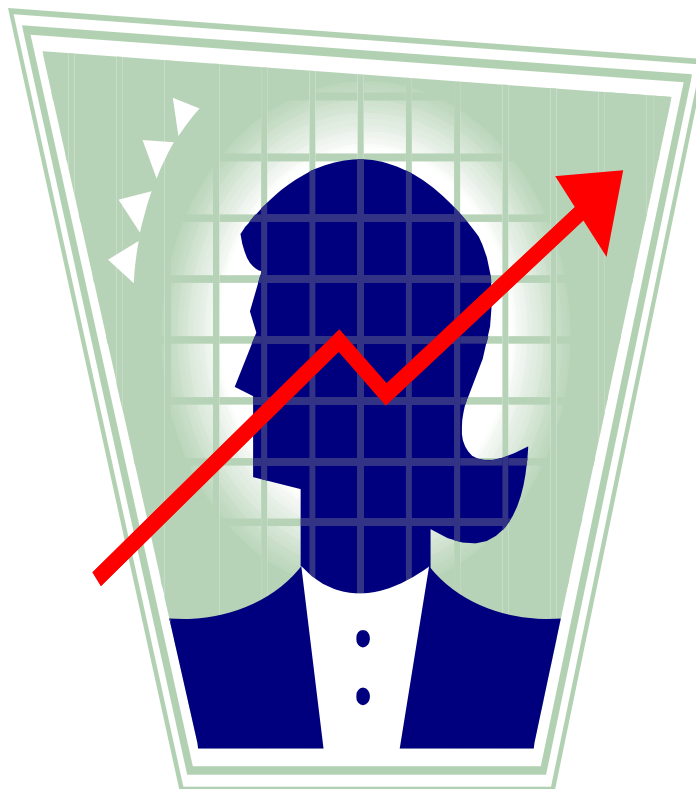
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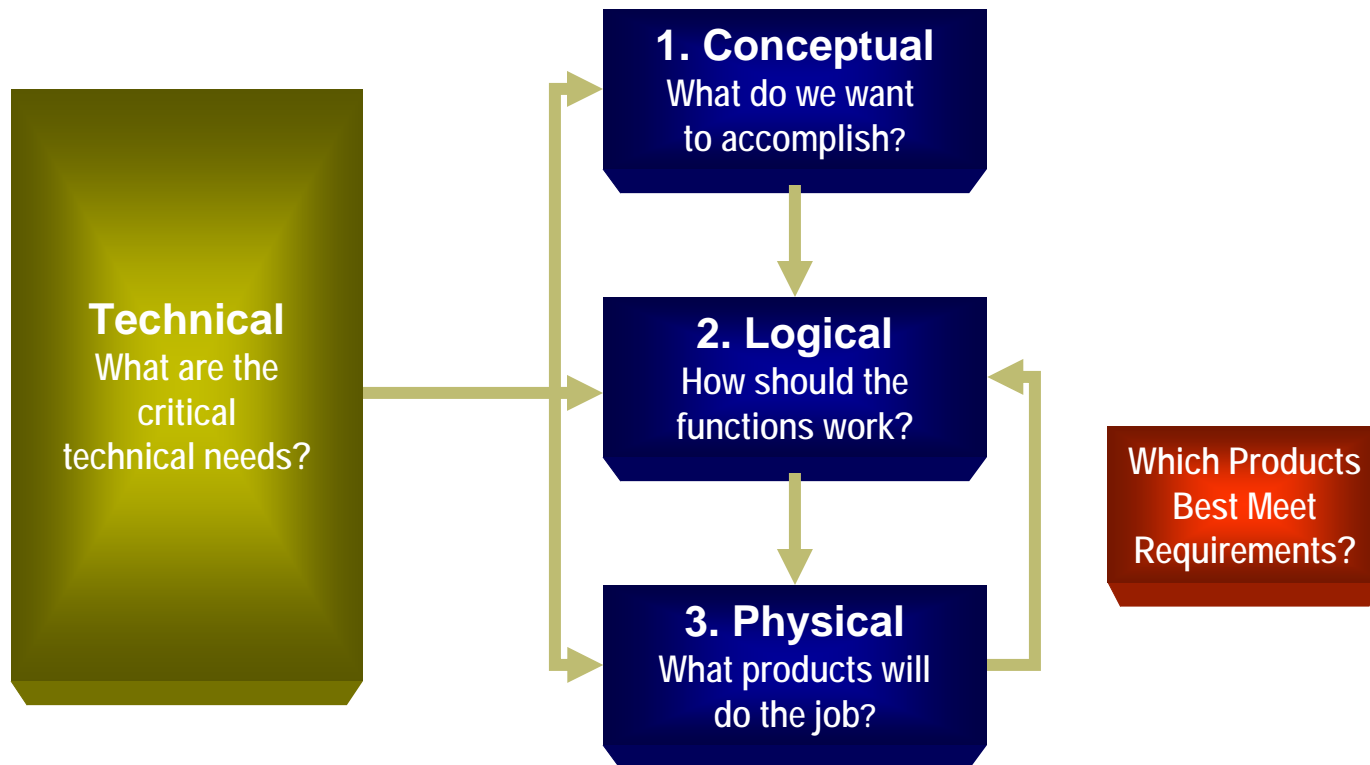
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## KM Solution Objectives



- **Find Knowledge**
- **Create New Knowledge**
- **Package & Assemble Knowledge**
- **Apply Knowledge**
- **Share Knowledge**
- **Store Knowledge**
- **Reuse and Revalidate Knowledge**

# What are the Requirements?





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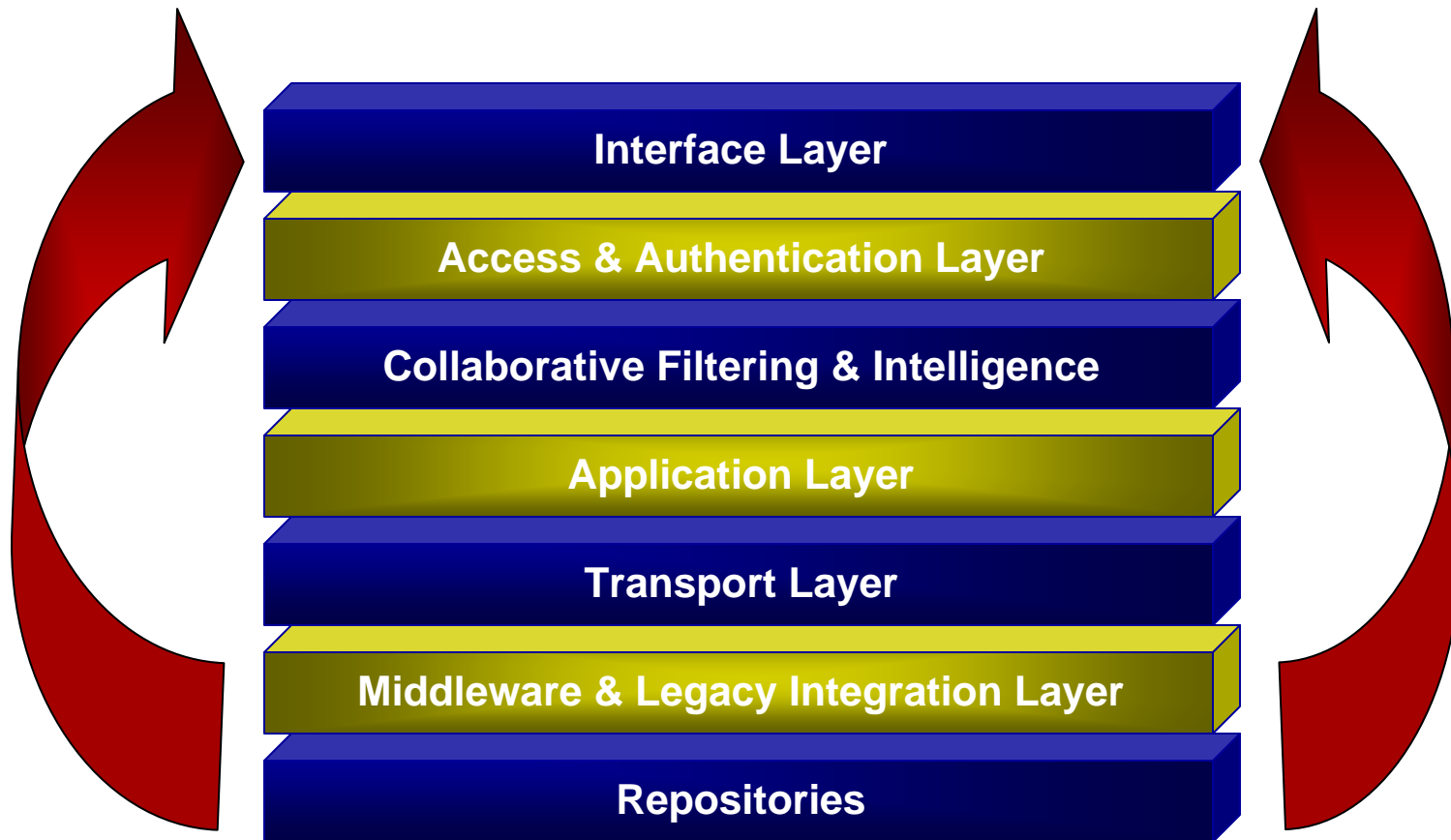
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## KM Technical Needs Checklist



- **Open Architecture**
- **Portability**
- **Scalability**
- **Integration**
- **Customizability**
- **Security**
- **Structural Flexibility**
- **Protocol Efficiency**
- **Technological Maturity**
- **Product Decomposability**

# KM System Architecture

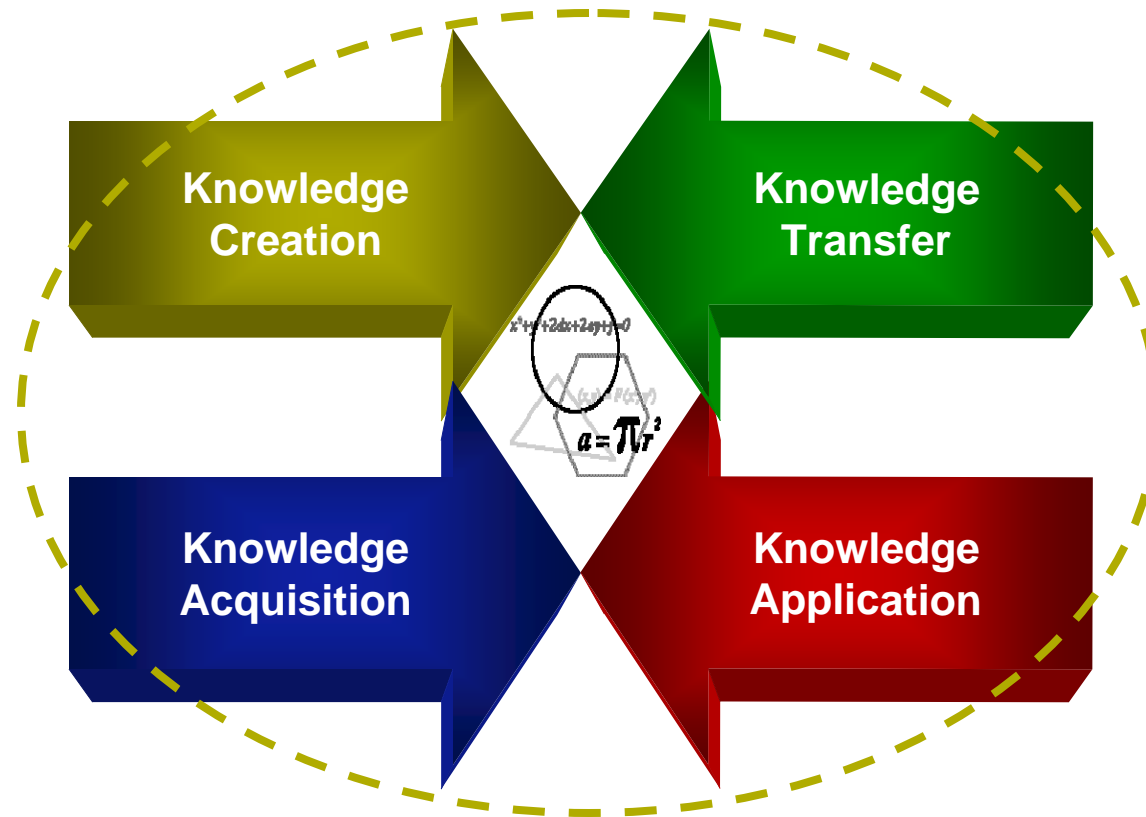


## KM Architecture Principles



- **Solution Design Elements**
  - Corporate Culture
  - Core Business Processes
  - IT Architecture
  - Industry Standards
- **Deliver Users Only Relevant Information From All Sources**
  - Structured
  - Unstructured
- **Integrate Platform, Desktop and Mobile Devices**

# Knowledge Enabled Technologies





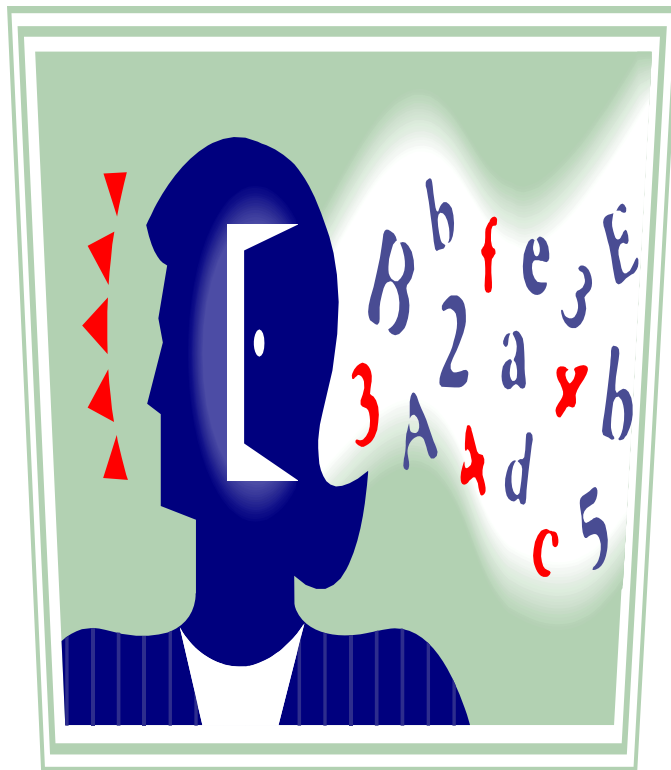
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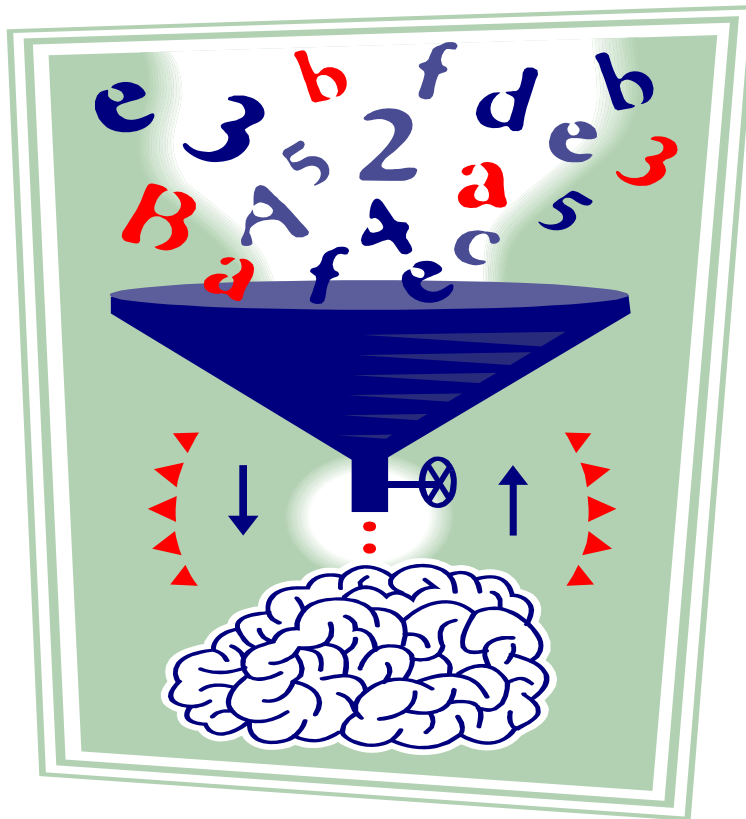
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# Knowledge Creation Technologies



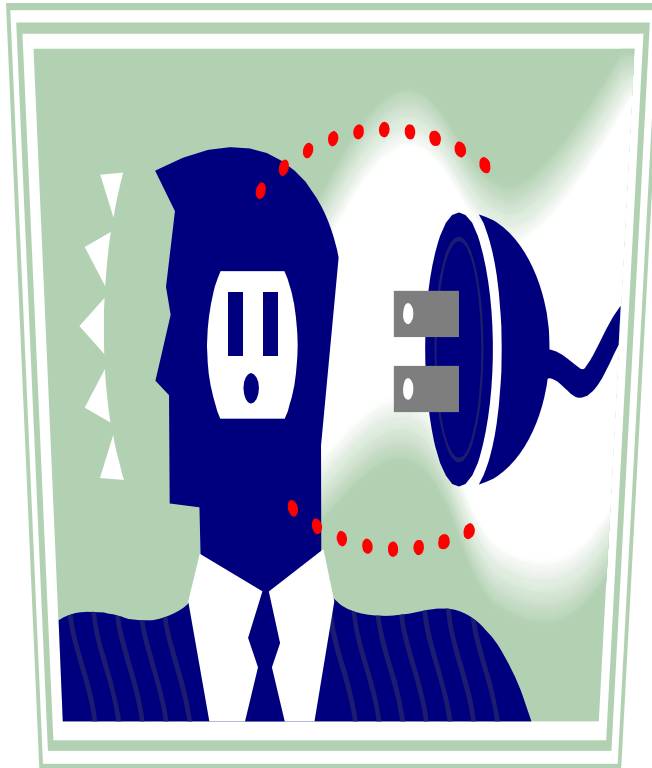
- **Document Management**
- **Content Management**
- **GroupWare**
- **Data / Information Repositories**

# Knowledge Acquisition Technologies



- **Data / Text Mining**
- **Search and Retrieval**
- **Internet Browser & Cookies**
- **Imaging, Scanning and OCR**
- **Real -Time Data Conferencing**
- **Online Chat Rooms & Bulletin Boards**

# Knowledge Transfer Technologies



- **Portals**
- **GroupWare**
- **E - mail**
- **Workflow**
- **Content Management**
- **Document Management**
- **Push / Intelligent Agents**
- **Publish & Subscribe**

# Knowledge Application Technologies



- **Learning Systems**
- **Business Intelligence Systems**
- **Decision Support**
- **Expert Systems**
- **Expertise Management**
- **Yellow Pages**
- **Portals**
- **Supply Chain Systems**
- **CRM Systems**
- **EIS Systems**

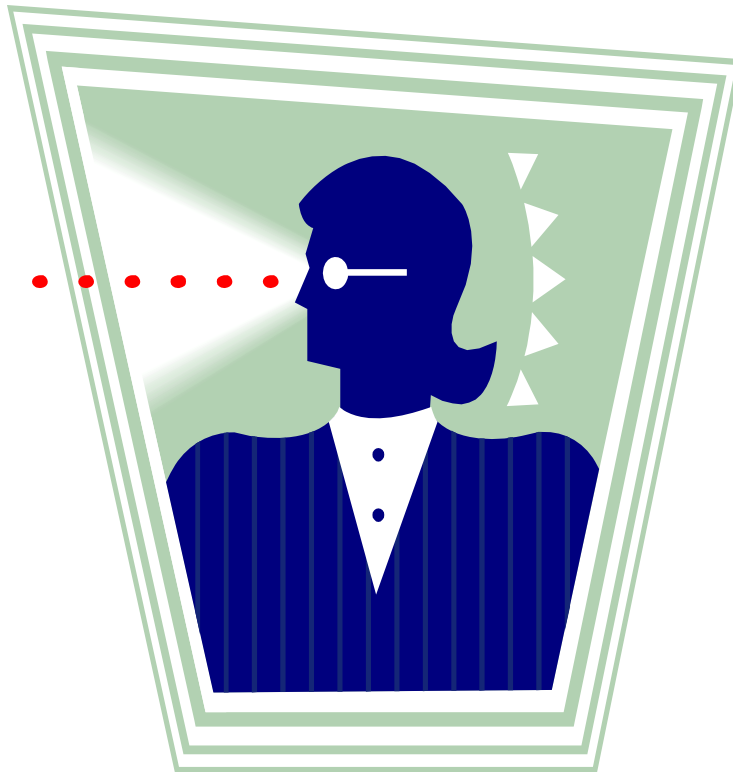


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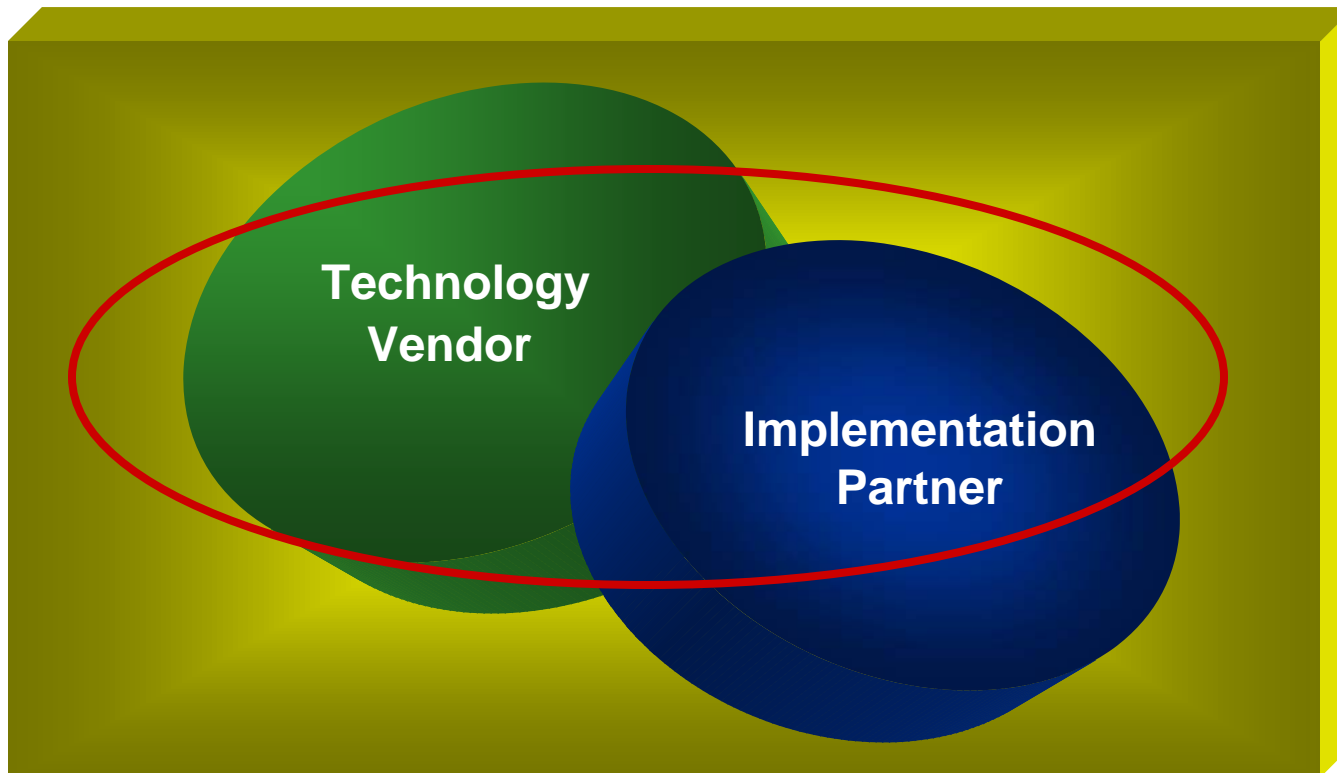
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## KM System Development Strategy

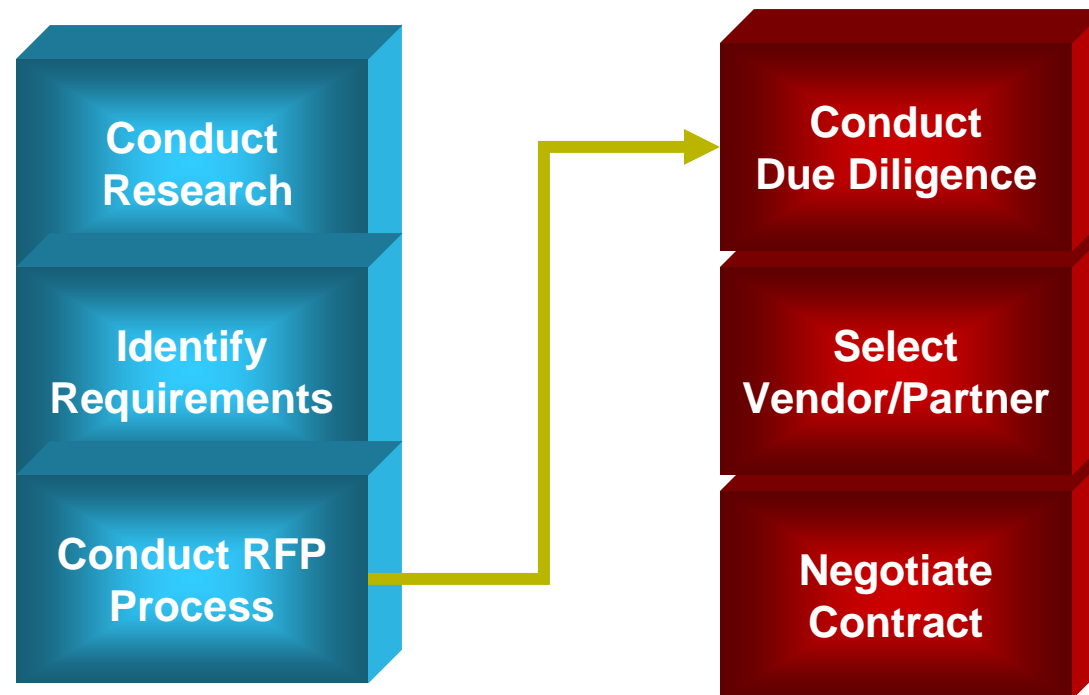


- **Build System In-house**
  - Maybe Engage a Consultant With Specialized Expertise
- **Buy Off-the-Shelf Solution and Customize**
  - Maybe Engage a Systems Integration Consultant
- **Buy Part and Build Part**

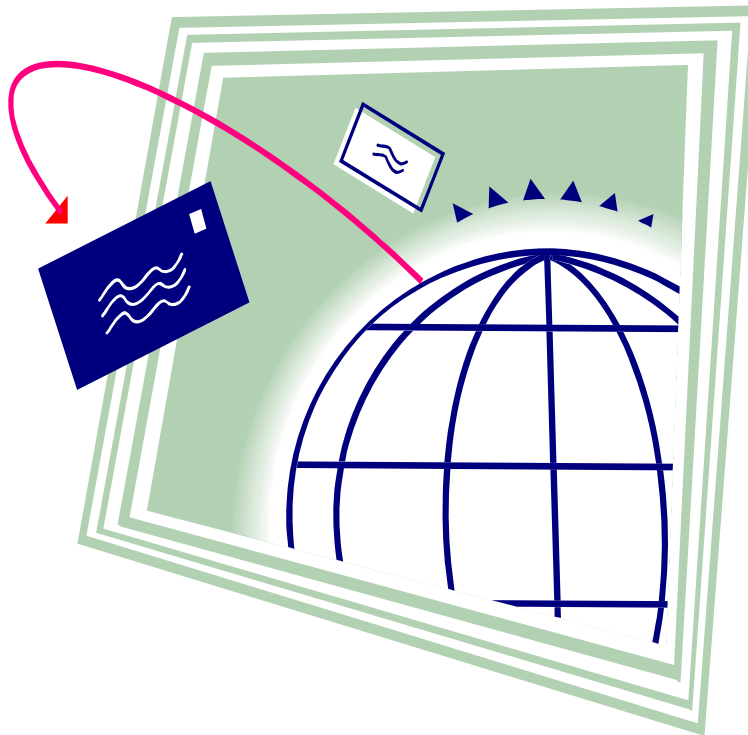
# Selecting The Right Partners



# The Partner Selection Process



## The RFP Process



- **Confirm Business and Technical Requirements**
- **Evaluate System Architecture**
- **Educate Staff and Users**
- **Plan Implementation**
- **Set Expectations**
- **Build Consensus**
- **Identify Partners**
- **Obtain Approvals**

# Implementation Partner Checklist



- **Professional Competence**
  - **Business Knowledge**
  - **Technical Knowledge**
- **Professional Contribution**
  - **With Me Personally**
  - **With My Team**
  - **With the Organization**
- **Personal Style**



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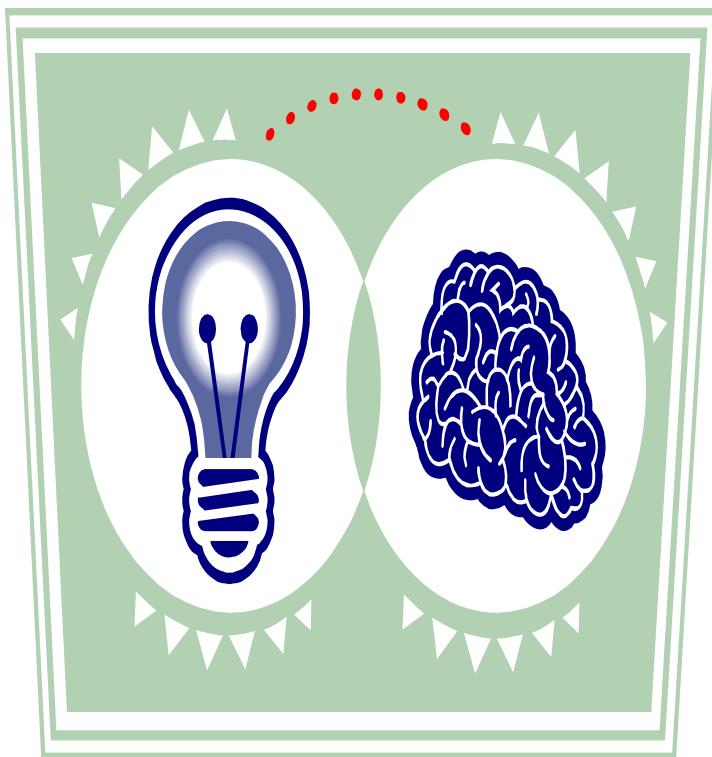
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## Project Manager Criteria Checklist



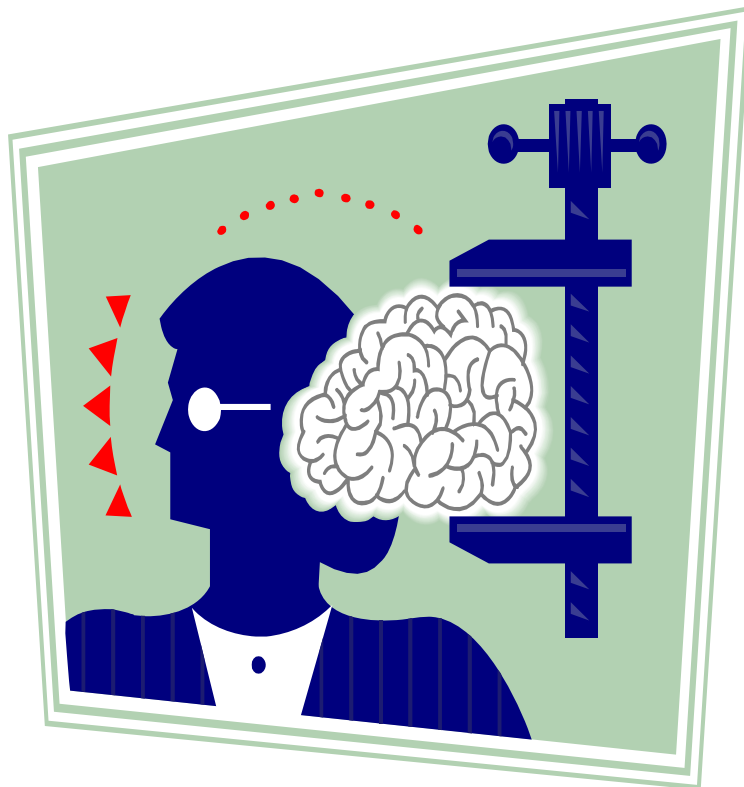
- **Trustworthy**
- **Sensitive to People and Situations**
- **Possesses Good Initiative**
- **Shows Good Judgement**
- **Flexible and Adaptable**
- **Makes Sound, Timely Decisions**
- **Has a Sense of Urgency**
- **Able to Motivate**

## Product Evaluation Checklist



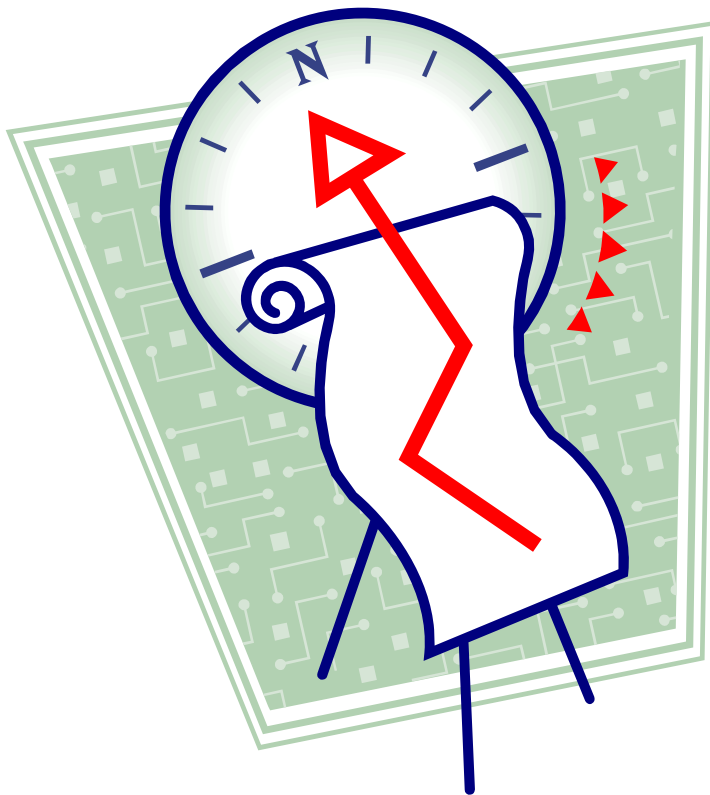
- **Does Product Conform to Industry Standards?**
- **Is Product in Line With:**
  - **Technical Requirements?**
  - **Business Requirements?**
- **Is Product Future-Proof?**
- **Is Product Up-to-Date?**
- **Are Future Versions of Product Planned?**

# Vendor Evaluation Checklist



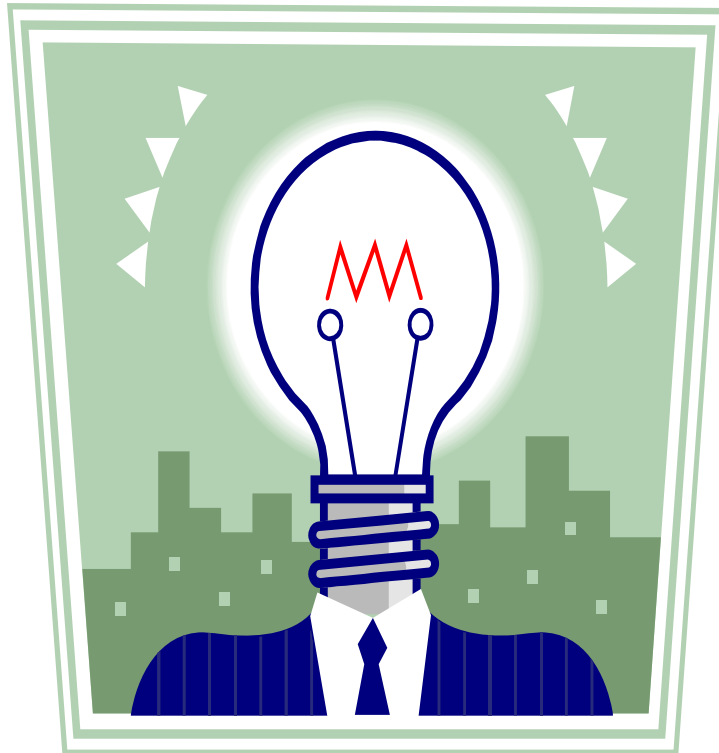
- **Study Vendor's Financials**
  - **Is Vendor Financially Viable?**
- **Monitor Vendor's Business**
  - **Is Vendor's Resources Spread to Thin?**
- **Evaluate Past Performance**
  - **Have Other Vendor Products Been Successful?**
- **Check References**
  - **Are Vendor's Customers Totally Satisfied?**

## Vendor Financial Checklist



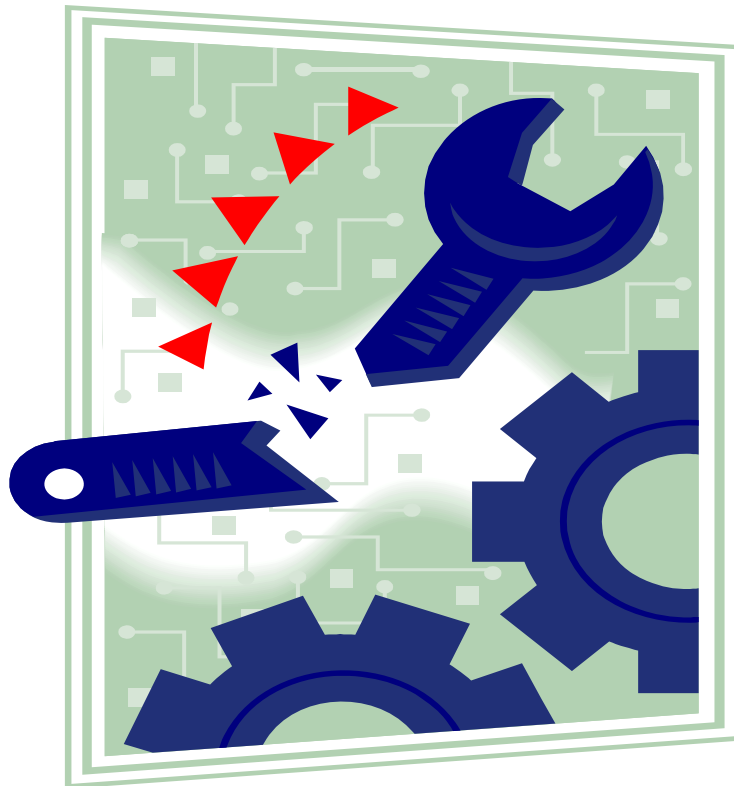
- **Evaluate Liquidity Rather Than Assets**
- **Scrutinize Cash Flow Statement**
- **Confirm That Cash Generated Matches Revenue**
- **Check if Collection Periods Have Been Lengthened**
- **Ascertain That Major Source of Cash Flow is Other Than Securities**

# Software Negotiation Checklist



- **Performance Requirements**
- **Rights to Outsource**
- **Support for Prior Versions**
- **Functionality Definitions**
- **Right to Transfer:**
  - **Operating System**
  - **Hardware Platform**
- **Maintenance Service Levels and Contacts Allowed**
- **Upgrade Fees**
- **Disaster Recovery**

## Partner Red Flags of Distress



- **Company Announces Layoffs and a Restructuring**
- **Employees Leave Company En Masse**
- **Top Executives Resign**
- **Stock Takes a Tumble**
- **Company is the Subject of Investigation**
- **Products are Sold at Bargain Prices**
- **Company Lessens R&D Investment**

## Project Bottom Line Impact



- **Reaction and Satisfaction**
- **Knowledge Transfer**
- **Learning**
- **Application and Implementation**
- **Business Financial Impact**
- **Return on Investment**
- **Intangible Benefits**



**Thanks**

*For Your Participation !*

*Kevin M. O'Sullivan*