

XYZ Knowledge Management Staff Support

1. XYZ Knowledge Management 2018-07-02

 Headquarters XYZ XYZ Knowledge Management Staff Support CONTRACTS TYPE: Prime PRICING: Fixed Price <i>If other, specify:</i>				
Contacts	Title	Name	Contact No.	Email
	CO			
	COR			
	Govt PM			
	Prime PM			
Contract #		Awarded		
Subcontract #		Cost/Price		
Period of Performance		Place of Performance		
HOME Contact		Contact Email		
Contact Phone		Contact Address		

1.1 Executive Summary of Work

Home Team (HOME) provided non-personal services for XYZ Knowledge Management Support. Our Knowledge Management support included Project management support, content services support, solutions support, business intelligence support and training support that assisted in technical and analytical support for the Chief of Operations (XYZ). Our effort ensured effective processes, products and overall mission accomplishment. Our team used SharePoint and Office 365 to automate business operations from tactical to strategic and supported XYZ in the areas of Requirements Analysis, Content Services, Custom Solutions, Analytics, Training, and Data Archive Management.

Our approach was to curate, consolidate, tag, and migrate content into Office 365. We used templates in SharePoint Document Libraries to standardize content creation and automatically enrich content with metadata throughout its lifecycle. SharePoint workflows allowed us to automate business processes and ensure that content lifecycle management requirements were met on time. SharePoint metadata, information policies and Office 365 Labels were used to automate the storage and disposition of corporate content. Metadata was used for business intelligence and analytics to track progress, measure performance and provide insights into business operations and potential focus areas for improvement and/or deeper inspection. Training was embedded into the sites and processes with the goal of creating a rich, engaging user experience that is simple and supportive.

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1.2 Background

1.2.1 Description of Services:

XYZ Knowledge Management Support will work in the office of the Chief of Operations (XYZ) to assist, orchestrate, and implement knowledge management actions for XYZ current operations, including Homeland defense, irregular warfare, special operations, personnel recovery, operational training, base issues, range issues, weather support, space warfare, cyber warfare, war-games, exercises, information operations capability, requirements, including fighter force structure and global mobility, plans and strategies. The nature of this support requires concurrent participation with multiple groups and dissemination of information across all levels of the organization.

1.2.2 General Task Description:

The purpose of this effort was to provide non-personal services for XYZ Knowledge Management Support to include the following areas: Requirements Analysis, Content Services, Custom Solutions, Analytics, Training and Support. Knowledge Management support included identifying and establishing a modern environment for XYZ KM to include Data Archive Management support. This effort assisted in technical and analytical support for the Chief of Operations (XYZ) to ensure effective processes, products, and overall mission accomplishment.

1.3 Background/Tasks Requested

1.3.1 Major Functional Task Areas

The contractor(s) shall provide support for the following major functional task areas under this PWS: (content deleted from this sample)

1.4 Work Description

1.4.1 Problem Statement

The XYZ Senior Staff had several KM challenges:

1.4.1.1 Content Management (Content Chaos)

HOME Team assisted the government to organize, streamline, and manage their content. With no governance in place, personnel were storing content on shared drives, government computers, external hard drives, and SharePoint sites with no standard naming conventions or version control.

Lack of Content Management promotes chaos throughout the organization. Time lost searching for content is unproductive. High turnover rates can undermine continuity of processes and ability to find content in unstructured and undocumented repositories. Non standardized file naming that does not convey useful information can lead to multiple versions of documents in unrelated locations. Documents are recreated when the user cannot find the content. There was no single source of truth. Absent role-based permissions lead to content security vulnerabilities. Ineffective content management governance causes disorder in the team, they will default to Content Management based on personal preference (shared drives, personal computers, email, SharePoint sites, etc.)

- Lack of technology leveraging

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- Unaware of how to use SharePoint versioning-version control was random and unmanageable; rogue documents existed
- People were unfamiliar with MS Teams or its use
- Creating entire sites just to store a few documents
- Individual permissions granted with no supporting business rules or permissions model
- No use or understanding of co-authoring

1.4.1.2 Process Management (Process Pandemonium)

Lack of Process Management fosters corporate disruption. Staff could not locate a process starting point, because there was no process documentation; it only existed in the process owner's mind and was communicated verbally. This creates poor audit readiness and increases risk to the organization. Due to high turnover rates, there was poor coordination between personnel, making it hard to promote consistent practices. Too many communication silos can inhibit consistency, collaboration, and change management that limit continuous improvement mechanisms. Use of nonhomogeneous, proprietary tools restrict process integration with no interaction between tools. Process alignment and results tracking were unobtainable without workflows and led to limited or no transparency.

- Outdated processes negatively impact productivity
 - Limited/Legacy use of technology
 - Legacy approaches (hard copy reviews, wet signatures, verbal approvals)
 - Email-based document reviews and approvals
 - Unnoticed review comments languishing in email inboxes
 - Use of Siloed Comment Review Matrix—difficult to compile

1.4.1.3 Data Analytics (Data Desert)

Inability to track progress measure performance, and continuously improve. Without dashboards there is no ability to: visualize realistic current situations versus assumptions, identify issue root cause, forecast trends, determine procedural steps required to create workflows for proactive issue prevention.

Unable to determine ROI or to measure success and effectiveness without developing Key Performance Indicators (KPI) to determine input-output and the outcome. This situation limits the facilitation of continuous quality improvement and the identification of bottlenecks.

Deficiency of metrics, status tracking, performance/lifecycle tracking measurements prohibits the evolution of the organization.

1.4.1.4 Training (Training Tailspin)

Organizations that get a reputation for not training may not attract or keep top talent. Process and software training are necessary in the contemporary workplace. Without it, employees have an unclear understanding of responsibilities and duties and cannot efficiently use the tools at hand. The organization is full of employees who have only a vague idea of how to conduct their work. Untrained employees will inevitably lack the knowledge to use company resources properly, which will lead to waste.

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- Low productivity and quality of work
 - Inability to efficiently complete a task
 - Time is lost in reinventing the wheel
 - Inadequately trained employees are likely to experience poor job performance
 - May be affected by safety issues
- Inability to adapt to change
- The organization cannot attract top talent
- Unprepared employees

1.4.2 Solutions

HOME helped the government improve their content management, automate multiple processes, and integrate analytics to track progress and measure performance. We modernized their business operations, adding transparency and accountability, which ultimately resulted in improved productivity.

To support reorganization, taxonomies were used to create authoritative data sources, which can be reused throughout the SharePoint environment. This design choice allows the user to manage the organizational structure easily without the need to redevelop or update the solutions. This concept will help minimize disruption of the XYZ portal during the next reorganization.

Home Team developed and deployed a custom task management solution for XYZ. This solution was designed for quick tasks that do not require a Task Management Tool (TMT) entry. This solution uses the modern Office Fabric-UI framework to display an O365 look and feel. Familiarity with the UI will assist in user acceptance.

1.4.2.1 Content Management Solutions

HOME assisted the government to organize, streamline, and manage their content. Content governance allows personnel facilitates storing data on specific SharePoint sites using a standardized file naming convention and version control. As part of the white-glove migration, HOME worked with individual organizations to migrate their content to the new XYZ portal sites.

Content was developed using templates and the full life cycle was automated, when possible, from creation through disposition. Approved and draft content used for reference was stored in the MS SharePoint environment, where each organization maintained full control. After content was finalized and approved, it was automatically published to the organization's Communication Site for broader audience consumption.

Sensitive content was secured using the new Microsoft Office 365 information security and records management capabilities to secure information at the document level. This new capability ensures document security travels with the document wherever it goes. This safeguards the content that leaves the environment will remain secure and information security policies applied will remain in place.

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1.4.2.2 Process Automation Framework Solutions

Multiple SharePoint sites scattered across several environments were consolidated into a single SharePoint site collection for classified and unclassified networks. The classified and unclassified environments were architected the same way to provide a common user experience. The design enabled information to be easily transferred from the unclassified to classified portal. This provided a more complete view on the classified side when needed without requiring users to double enter data. This promoted data quality and consistency of information.

The entire information environment was fundamentally re-architected to align with the new Microsoft (MS) Office, 365 Paradigm. MS Teams was incorporated as the new centerpiece for the MS Digital Workplace concept. The role of SharePoint Online in the new O365 Model is more focused on content and security, and no longer recommends the use of subsites. Instead, the concept of a Home and Hub Sites is the new concept of organization. By integrating other revolutionary sensitive information and records management capabilities into the framework, several long-standing information privacy and security issues were completely resolved.

The SharePoint-based Intelligent Information Management System was designed to support both organizational and functional perspectives. MS Teams sites were created for each department to manage their organizational-specific information and processes. Various MS Teams sites were created to support functional areas with matrixed support from multiple offices. Sites were designed with a common look and feel, and information was structured in a standard way—so that the top of each landing page showed the Mission, Leadership, Main Contact information, Members, Relevant News, and Published Content. The rest of the landing page was customizable.

Processes were automated and executed in the MS Teams environment for each organization. When finalized, the content was automatically published using a SharePoint Workflow to the organization's Communication Site for broader audience consumption and automated records disposition.

1.4.2.3 Data Analytics Solutions

HOME built multiple dashboards to collect performance measurements to visualize realistic task completion, budget adherence, and quality standards. This contributed to identification of root causes for unplanned events, justifying out of scope work to meet requirements, and the ability to forecast trends to enable better business decisions.

Analysis of procedural steps and processes were used to create automated workflows that allowed management to see process and timing issues and incorporated more proactive activities.

Key Performance Indicators (KPIs) became easier to recognize and use to measure success, determine ROI, start continuous quality improvement efforts, and identify bottlenecks. These performance management and lifecycle tracking mechanisms energized the organization and change management became possible.

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1.4.2.4 Training Solutions

HOME evaluated training requirements and created various training materials:

- Written instructions
- How-to guides; screenshots to videos
- Embedded training materials in context with solutions, pages, lists, and libraries
- Updated and maintained training materials
- Provided tier-0 self-help solutions
- Provided end-user support for solutions
- Documented solutions

Training in internal processes and software use leads to higher productivity in the workplace, employees were empowered to perform duties and responsibilities with confidence and efficiency. Problem solving is more likely, and well-trained staff are better prepared to adapt to change. Workers who are trained in the State-of-the-art processes and software will be better able to perform and do more at a higher level.

1.4.2.5 Strategic Roadmap Solution for Government Cloud Community

A Strategic Roadmap was developed, briefed to senior leadership, and approved for execution. When HOME began work with XXX, they were not planning to migrate to the new Microsoft Office 365 environment. We presented the challenges XXX would likely experience if they continued to operate in the Legacy on-premises environment. The HOME Team offered findings and recommendations regarding the current plan to the XXX Knowledge Management Executive Council. The Council endorsed our recommendation to migrate to the new MS O365 environment. The XXX put HOME in charge of piloting the transition. HOME led technical preparation and worked with Microsoft and XYZ technicians to prepare the legacy environment for transition.

"Inefficient processes waste nearly a third of an employee's time as well as speed and efficiency, automation offers a simpler way of working."

By [Adam Reynolds](#) | Webexpenses - June 19, 2019

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1.4.3 Value and Benefits**1.4.3.1 Content Management Value/Benefits**

Single authoritative location for content that is logically and functionally organized is essential when sharing documents. Published content provides accessible, authoritative information that is discoverable throughout the organization to authorized users.

Granular role-based permissions model enables more efficient and effective centralized permission management tracking. This improves security and visibility on need-to-know access. When staff migrates to new positions, permissions can be easily evaluated and changed.

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Organized team sites with fully searchable information improve productivity and efficient information discovery. Staff have access to critical information and development of organizational memory. This type of memory accumulates bodies of data, information, and knowledge by an organization. This includes acquiring components/domain knowledge that comprise facts, concepts, principles, rules, procedures, and strategies. Also, knowledge management, search and retrieval knowledge (human memory or machine learning) play a significant role in organizational information models.

1.4.3.2 Process Automation Value/Benefits

Process automation encourages staff to spend more time on thoughtful tasks so that more deadlines are met. This eliminates time spent on repetitive, time-consuming tasks that can cause loss of productivity.

Errors are reduced through automated processes (workflows). Examples are through manual keyboarding, inability to access and share essential information buried in emails.

Efficiencies are produced using automation instead of physical transfer of hardcopy materials for review and approvals, and verbal exchanges that are seldom documented.

Reusable assets create consistent experiences and reduce development costs. Replicated, reusable, best practices support success across the enterprise.

1.4.3.3 Data Analytics Value/Benefits

Dashboards enable visualization of key metrics that empower well-informed decisions. This allows mutual knowledge of current situations and management can better communicate present conditions in the organization. Visualized metrics and data trends help to improve navigation through issues. The gathered data produces reports that support planning and prediction of future outcomes.

1.4.3.4 Training Value/Benefits

Training creates employees who better adapt to change, new software, updated processes. They readily understand and adopt new ideas and methods. Consistent training increases positive momentum and motivation to learn and grow. Branded user experience (UX) reduces navigation efforts, training requirements, and expedites adoption of new software. Standardizing user interfaces with corporate branding, using common font libraries and modern web components to establish best practices for IT enterprise services; creating custom graphics; and documentation of solutions all lead to simplification of user experience.

Employees produce higher quality work with increased job performance. They are better prepared to manage new tasks and can follow uniform work patterns. Training on modern tools allows co-authoring in the SharePoint environment and encourages the attraction of more skilled talent.

“Time to talent” is a process of training the workforce to do a better job; talented employees not only improve the work process but also the operation of the company. They are up-to-speed and quicker performers. They have the ability to do a job faster, more easily, and better!

Training is considered a great method to recognize potential in your organization and help create well-connected, committed employees who become outstanding leaders.

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1.4.4 OnePoll Survey Resultswww.onepoll.us

"On average, 26% of an employee's day will be wasted on avoidable administrative chores, unnecessary tasks, and outdated ways of working. A breakdown of the areas identified as being the biggest daily time wasters included:

- 42 minutes spent on needless administration tasks
- 36 minutes involved in unproductive work conversations
- 28 minutes having to attend unnecessary meetings
- 26 minutes devoted to outdated technology tasks

The general picture to emerge from the data is of frustrated employees struggling within workplaces where manual and paper-based processes are still commonplace. Nearly half (44%) of UK respondents classed their company's office technology as being 'woefully outdated'.

Globally, more than a third (38%) of those surveyed said their employer is still reliant on manual administration processes and 48% believed they would be more productive if they were given access to better office technology and tools.

For 40%, administrative chores were preventing them from completing their core tasks and 39% said that, as a result, they regularly felt unhappy with the quality and quantity of their work output during the day."

By [Adam Reynolds](#) | Webexpenses - June 19, 2019

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1.5 Deliverables (6 of 23 are included in this sample)

The following items are deliverables executed under the XYZ contracts; SharePoint solutions created for the Operations (XYZ), by Home Team.

(1) GLOBAL SERVICES LINK

Client Problem	The client needed consolidation of services on SharePoint: ▪ They had too many ways to request help, no version control to understand if it was current or out-of-date information ▪ They needed an email generator ▪ Civilian, contractor and military In-Processing ▪ Problem reporting, Software requests and Service Desk contact was to be standardized
Solution	This solution provides a standard menu of links in the SharePoint portal, which will be managed by authorized personnel and used as the authoritative source for self-help. Some solutions were standard SharePoint functions and other required HOME to build new Apps. ▪ Personnel Tracker

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Value Benefits	Time is saved by providing easy access to commonly used information and applications. Clean up of extraneous links and pages helps to declutter the site and makes it a more logical work environment.
(2) JOB JAR	
Client Problem	Storage and Process disorganization: ▪ Users did not know where to find information ▪ Little evidence of Process and Policy documentation ▪ Attempts to document organizational responsibilities using Microsoft Word documents were not being maintained and there was no authoritative source for all the jobs ▪ Organizational leaders could not accurately identify who was doing what in their organization
Solution	A Personnel Tracker was implemented. ▪ This solution centralizes the display and management of all jobs and associated personnel in SharePoint with Search capabilities that allow users to quickly find Jobs, POCs, contact information, and online status/availability ▪ The list was managed by authorized personnel and used as the authoritative source for all job information ▪ A Webpart was used to query the job jar and display the jobs belonging to the selected organization and its immediate sub-organizations. The jobs were organized in tabs, based on the organization its associated with
Value Benefits	A SharePoint solution using a Webpart displayed department, personnel, and their roles with responsibilities to staff. This enabled staff to reach out to specific persons for guidance when questions arise. The list is maintained to reflect current personnel and acts as an authoritative list for all job information.
(3) ORGANIZATION MANAGEMENT	
Client Problem	A SharePoint solution using a Webpart displayed department, personnel, and their roles with responsibilities to staff. This enabled staff to reach out to specific persons for guidance when questions arise. The list is maintained to reflect current personnel and acts as an authoritative list for all job information.
Solution	This solution provides a standard way to manage organizational information, with the ability to display the structure visually. The solution includes the use of: ▪ Managed Metadata ▪ Custom Properties ▪ Web parts ▪ Overview that is generated
Value Benefits	This solution is a one stop shop for users to find phone numbers and room numbers of co-workers. A view of the Organization and sub levels is also provided.

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(4) PERSONNEL TRACKER	
Client Problem	The client currently has no way of tracking personnel within the organization and sub-organizations. Attempts to pull active personnel, to assign to org and sub-org security groups was a challenge, due to the data not matching up or being out of date. No synchronization of list data with SharePoint site groups.
Solution	This SharePoint 2013 and Online solution was designed to remove the need to manage outlook distribution groups. A panel is displayed, allowing the user to select the organizations to email. The user will have the option to select the personnel type(s). Once selected, an outlook email will be generated with the associated users. The Office 365 environment allows site groups to be emailed as part of the new modern user experience. This solution will not be needed once upgraded to O365. The personnel metadata was stored for each member of the XYZ organization. ▪ Field Title ▪ Field Name ▪ Field Type ▪ Note (Memberships)
Value Benefits	All users are added to the "Members" group, regardless of their permission level. If the user belongs to a permission level other than "Member," then they will be added to that group as well. Custom client-side web parts were developed to display personnel data on various pages. This allows the user to easily configure pages without assistance from a technical developer/user.
(5) CONTENT MANAGEMENT SYSTEM (CMS)–TASK MANAGEMENT	
Client Problem	XYZ spends an extended amount of time trying to manage their tasks from daily morning meetings. The solution solves the following issues: ▪ Must Solve: ○ Allow for an "Excel-Like" experience for bulk updates ○ Decrease time to add and assign a task ○ Decrease time to edit an existing task ○ Provide an effortless way to reassign tasks to ○ Single User/Group ○ Multiple Users/Groups ○ Meet records management policies ▪ Nice to Solve: ○ Chat interface for commenting ○ Indicate new tasks to user ○ Track time to close a task ○ Provide metrics for determining bottlenecks in the process
Solution	HOME used SharePoint out of the box features and enhanced functionality with custom development.

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	The Task list allowed the user to have the benefits of synching with other MS tools. We used a multi-line text field with "append changes" enabled to allow users to add comments to the tasks. Completed tasks were archived to ensure a short list to help with performance and simplify reporting and analytics. A custom JavaScript method deployed to each page runs to a "My Tasks" indicator for the user. Approval workflows were also established.
Value Benefits	HOME used SharePoint out of the box features and enhanced functionality with custom development. The Task list allowed the user to have the benefits of synching with other MS tools. We used a multi-line text field with "append changes" enabled to allow users to add comments to the tasks. Completed tasks were archived to ensure a short list to help with performance and simplify reporting and analytics. A custom JavaScript method deployed to each page runs to a "My Tasks" indicator for the user. Approval workflows were also established.
(6) DEPLOY FOR OVERLAY (MIGRATION ACTIVITIES)	
Client Problem	Lack of communication that a site has been moved and is going to be deleted.
Solution	HOME developed and Overlay to advise users who visit the site of the move and direct them where the content is now living. ▪ We edited the Master page ▪ Told clients how we moved their data ▪ Informed clients on how to migrate their information; provided help, when necessary, to guide them in the process ▪ Provided a pop-up message and a link to click on for bookmark setting ▪ Provided notice to indicate after 30 days, an auto site delete would happen ▪ Get redirectedRedirected traffic and locked the site down & faded orig and archived the out-of-date site down
Value Benefits	▪ Full user guidance through athe data migration process to allow users to locate their necessary data ▪ Full productivity during migration activities

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