



Knowledge Transfer in Practice

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Assistant Director, Research & Knowledge Transfer

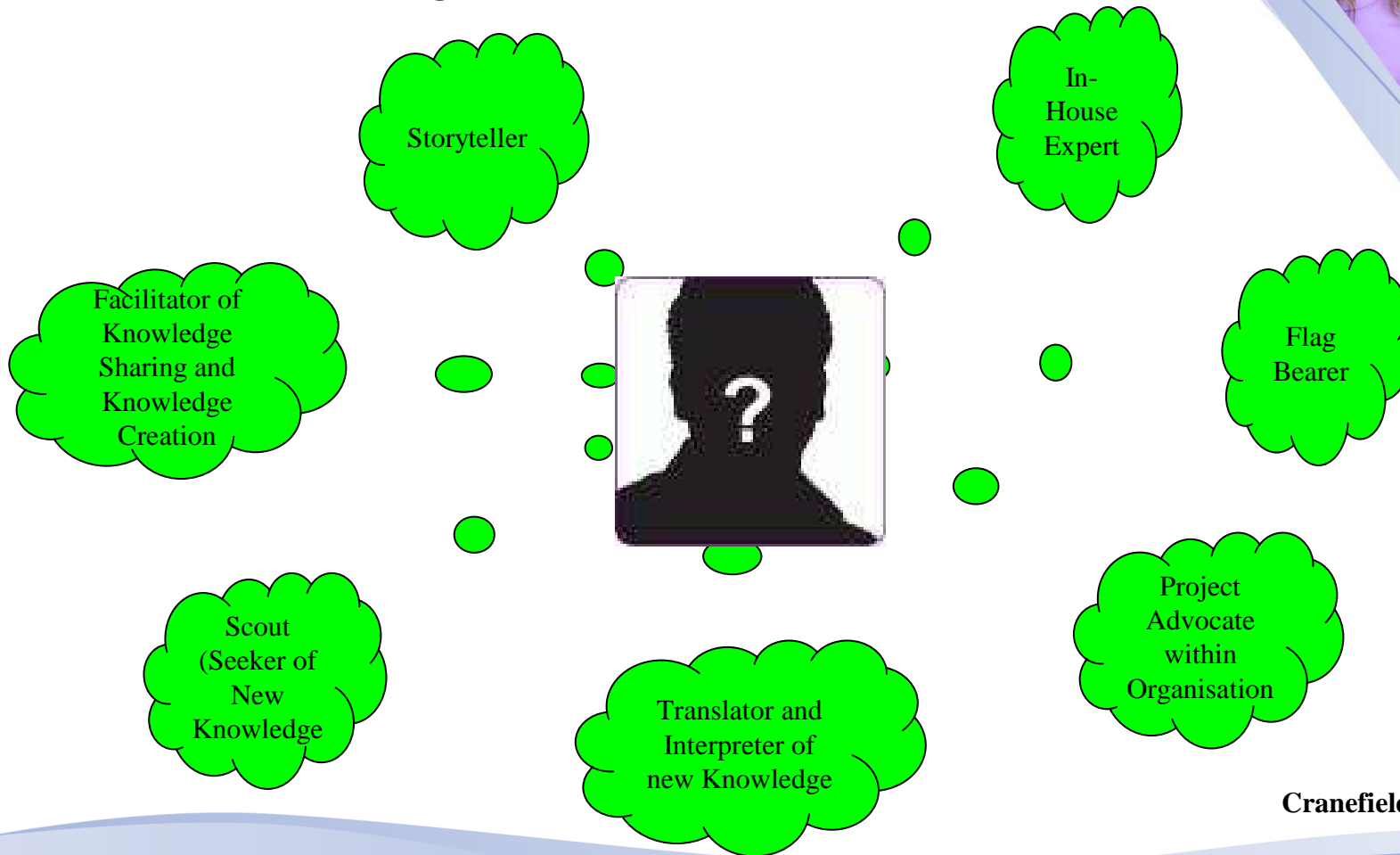


Aim: To provide an understanding of the management tools, techniques and infrastructure required to enable effective Knowledge Transfer

- Managing Competing Motives
- Project Management
 - Setting Objectives
 - Planning Work
 - Constraining the Scope
 - Time & Resource Planning
- Meeting / Dating / Mating
- Process Models
 - Process Mapping (IDEF)
 - Triage & Decision Support
 - Quality Management
- Structuring KT Offices



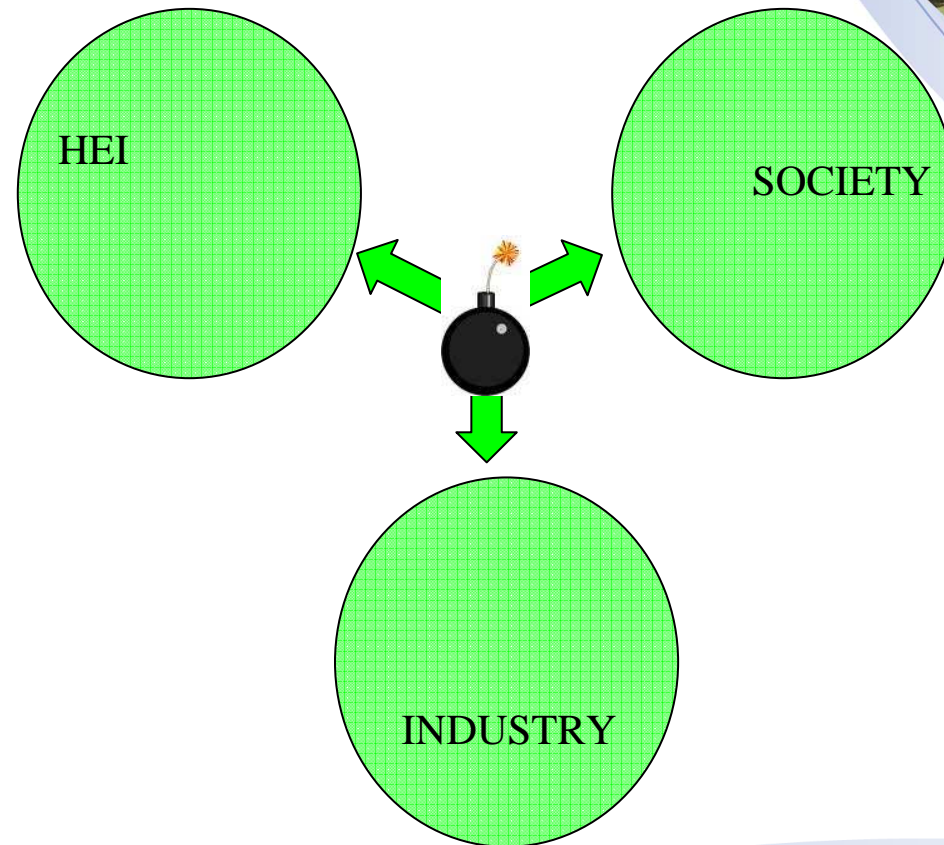
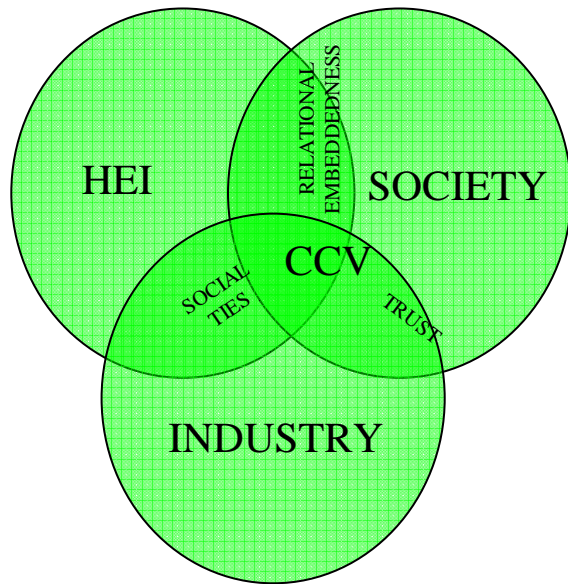
Knowledge Gatekeeper



Cranfield & Yoong 2007



Competing Objectives



Project Management

Project Management

Project Management “is the critical activity within the management of change that acts as the ‘glue’ in bringing different competencies together and coordinating the flow of information between them” –
O.Izinak 1994

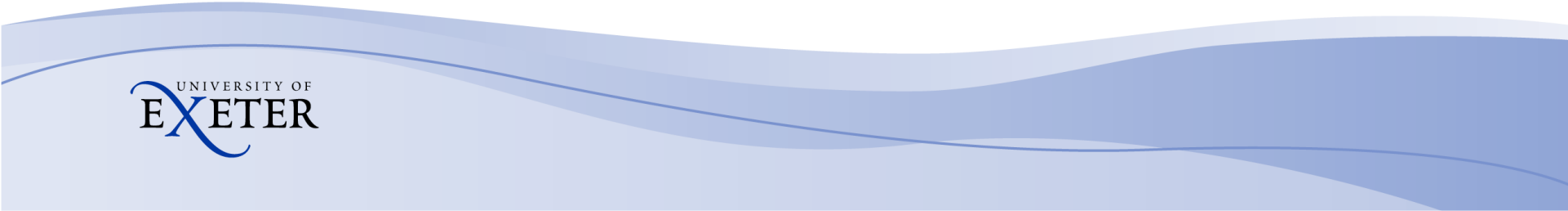
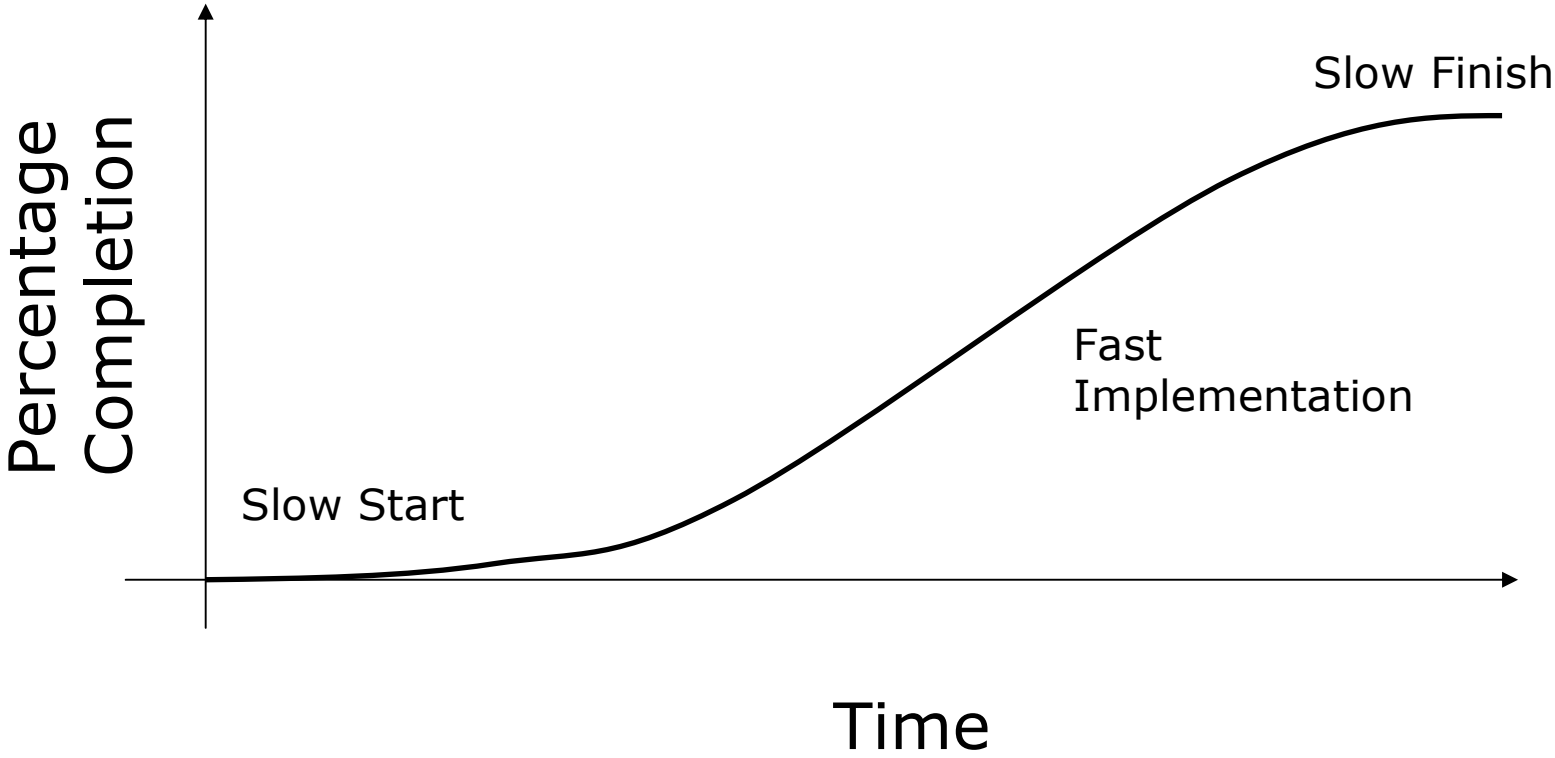
‘Good Project Management still proves to be an effective and efficient way of managing change in many types of organisation’ – BSI
01-2010



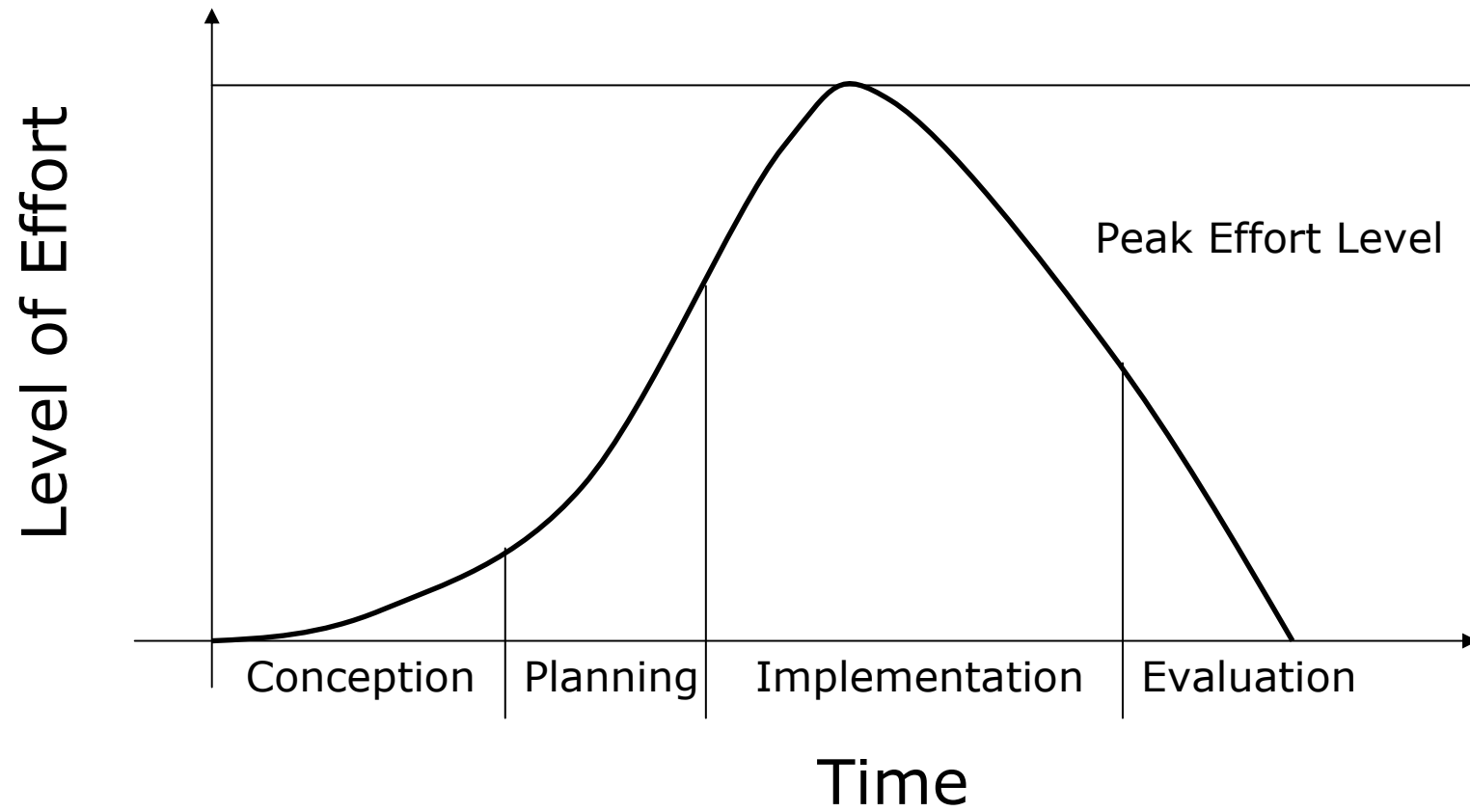
How to Define a Project

One or more Deliverables	Clearly Defined Start and Finish	Must have a duration or time frame for completion
A unique one-off nature	PROJECT MANAGER	A limited set of resources L/P/M
A sequence of activities and phases	Boundaries of time, cost and quality	Involve several people on an ad-hoc basis

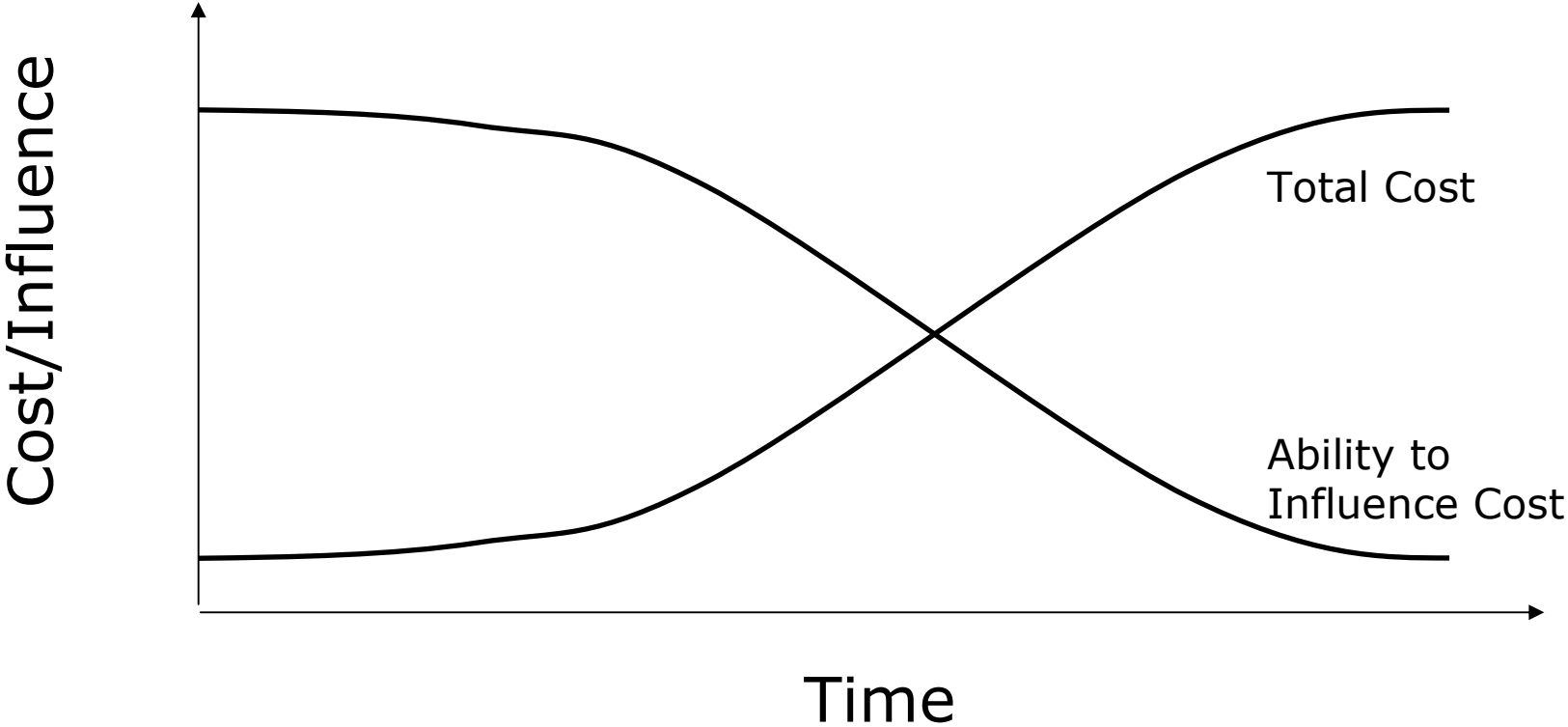
Project Life Cycle



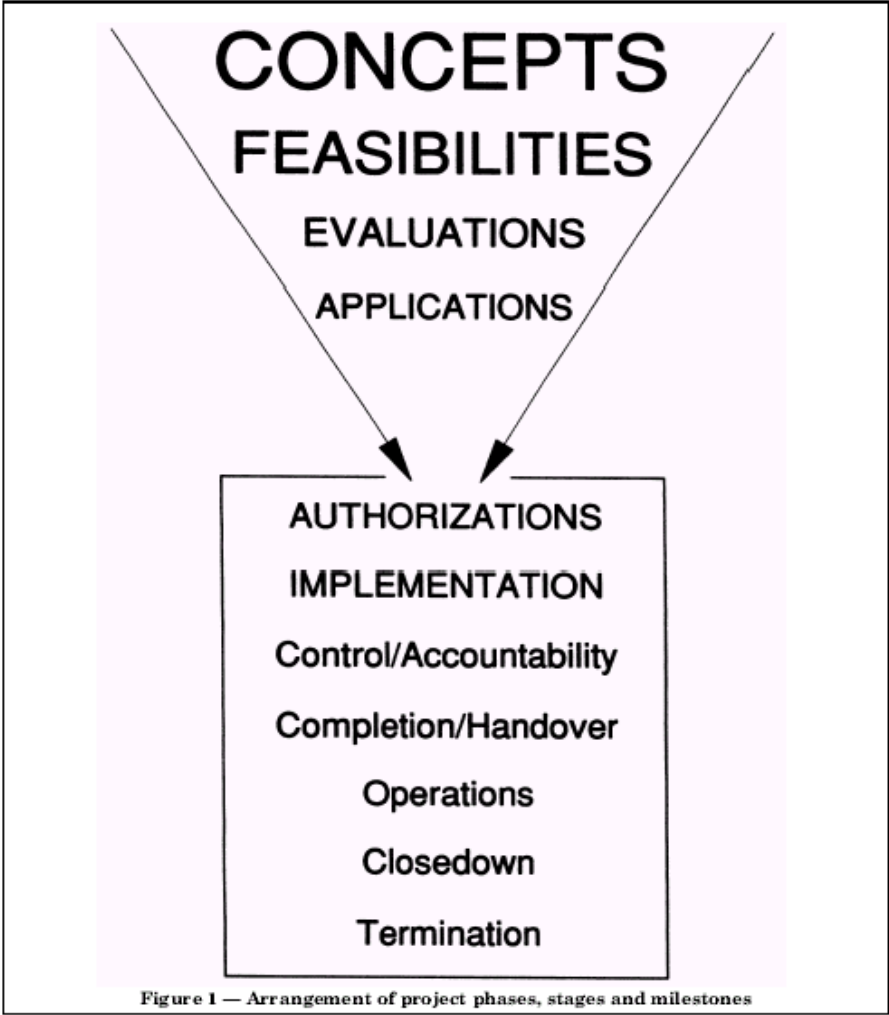
Project Effort



Project Expenditure



The Project Lifecycle



Project Planning Stages

- Defining the Objective
 - Keep it simple, think the project through, communicate and iterate with project team and stakeholders.
 - Set achievable but testing objectives, to get the best performance from the project.
 - Make sure everyone understands them!

Setting SMART objectives

- **Specific** – clear and unambiguous
- **Measurable** – results can be easily monitored
- **Achievable** – practical, realistic and agreed
- **Relevant** – relate to actual performance
- **Time-based** – have a target completion date

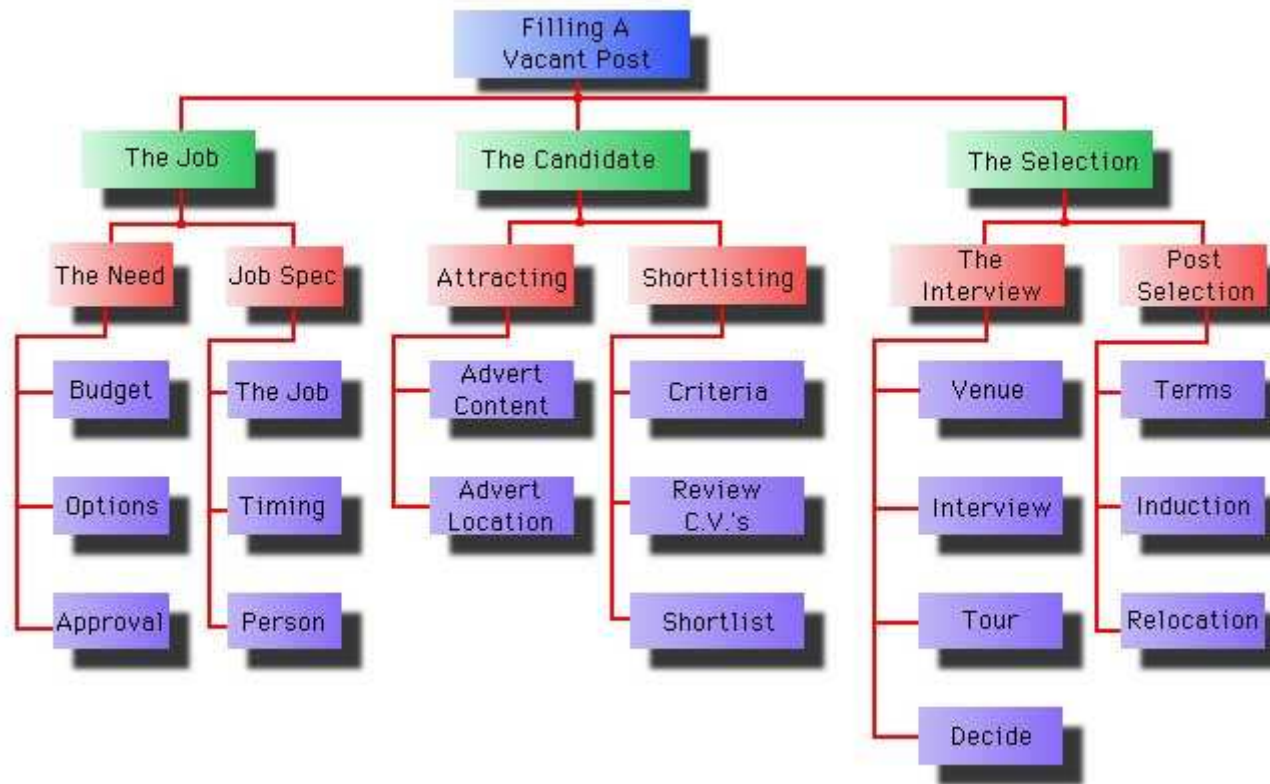
Project Planning Stages

- Planning and Organising
 - Do not skimp on this phase, everyone likes to get into the action.
 - Set up key stages of the plan and break the workload down with a Work Breakdown Structure.
 - Asses the risk of each phase (against QTM) and focus more planning into high risk areas of the project.
- Establish Benchmarks and Controls
 - Set up a feedback systems so you can easily see project performance.
 - Use this system to report against to both stakeholders and management.
 - Remember you can measure performance as a project progresses but you cannot measure success until it has finished.

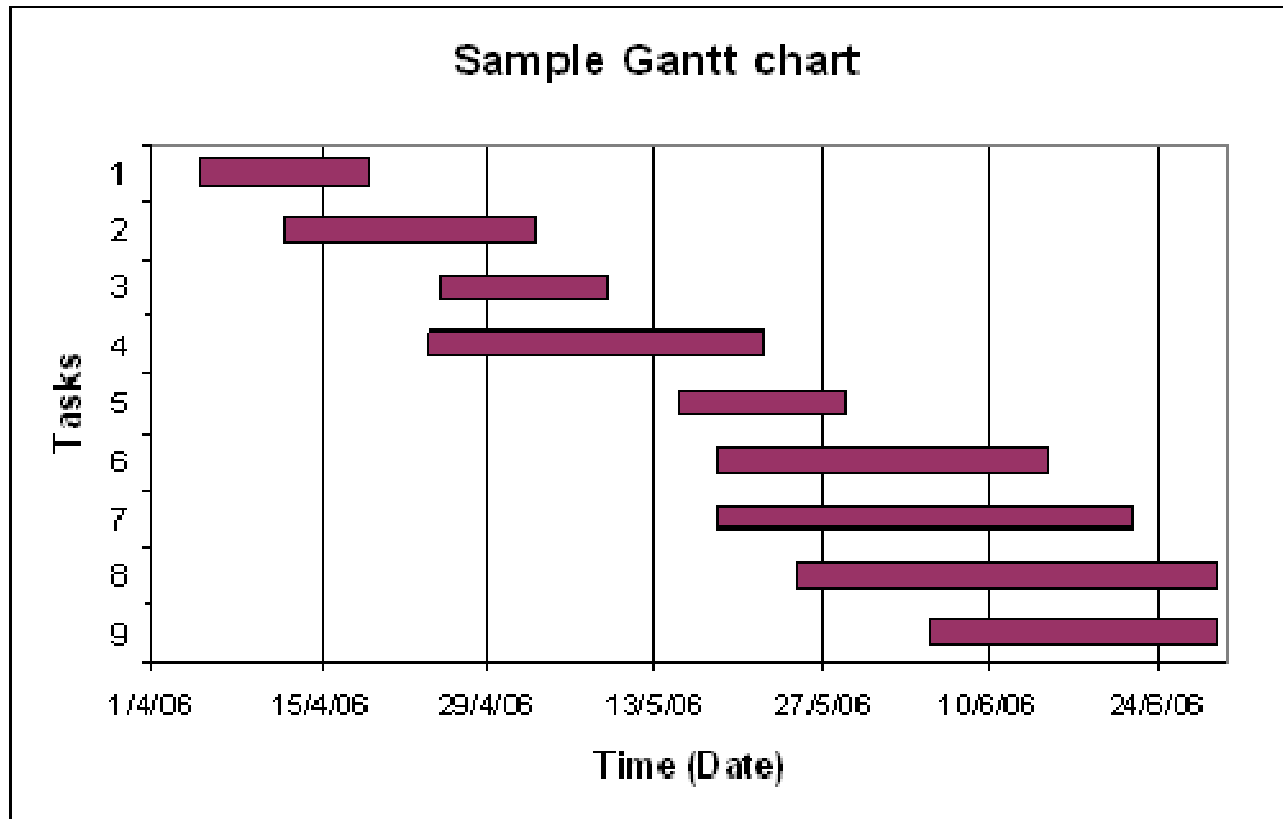
Project Planning Stages

- Implementation
 - The fun stage where you build things!
 - The point when a plan becomes an activity and preparation pays off!
 - **OR** the point where skimmed planning and lack of understanding of the scope comes back to haunt you!
- Project Close Out
 - When the project is taken over by the end user
 - When substantial completion has been reached

Work Breakdown Structure



Project Plan





WHAT SHOULD HAPPEN

MEET

Exchange details
Give generic info re: Uni

DATE

Business need
Past work we've done
Case studies
Confirm desire to collaborate
Past relationships with HEIs
Influential positions
Discuss RKT services (DON'T SELL)
Discuss potential collaborations

MATE

What is the payoff for fixing these problems?
How much would solving the problem be worth?
Confirm collaboration opportunities
Match RKT services to need

EoI/ Intention to bid confirmed

Contact Entry

Concept Form

WHAT INFORMATION IS NEEDED

Size of company
Company sectors
Existing links with other Unis
Preferred working practises
Problem information (Current/Future)

Name
Organisation
Address(es)
Job title
Phone number(s)
Email address(es)
Additional positions
Level of engagement
Sector

What are the company's problems?
How much does it cost?
What resources does it use?

Grantholder(s)
Sponsor(s)
Outline description
Working title
Proposed start/end dates
Estimate Value

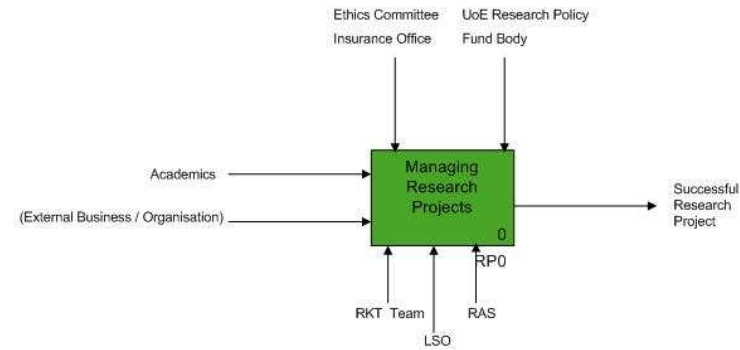
Confirm grantholder(s)
Confirm sponsor(s)
Confirm outline description
Confirm project title
Confirm start/end dates
Update project value

WHAT THE INFORMATION IS USED FOR

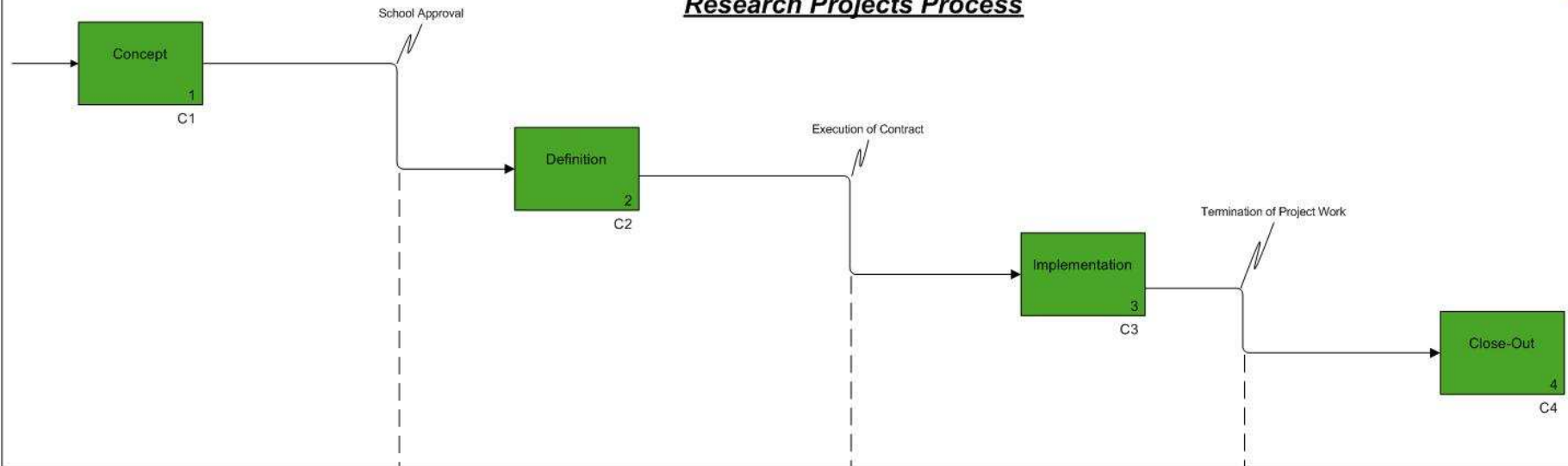
Event marketing
Stakeholder Lead
Private/Read Only
Identify possible partners for research

Informs management reports
Reported to David Allen
College business plans (pipeline activity)

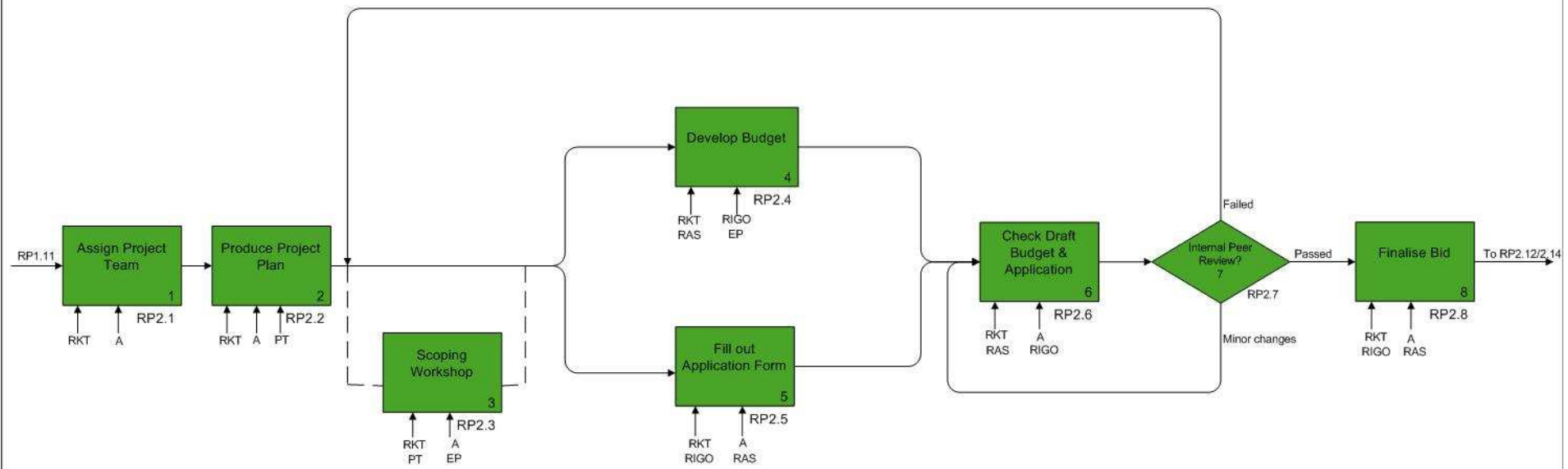
Research Projects

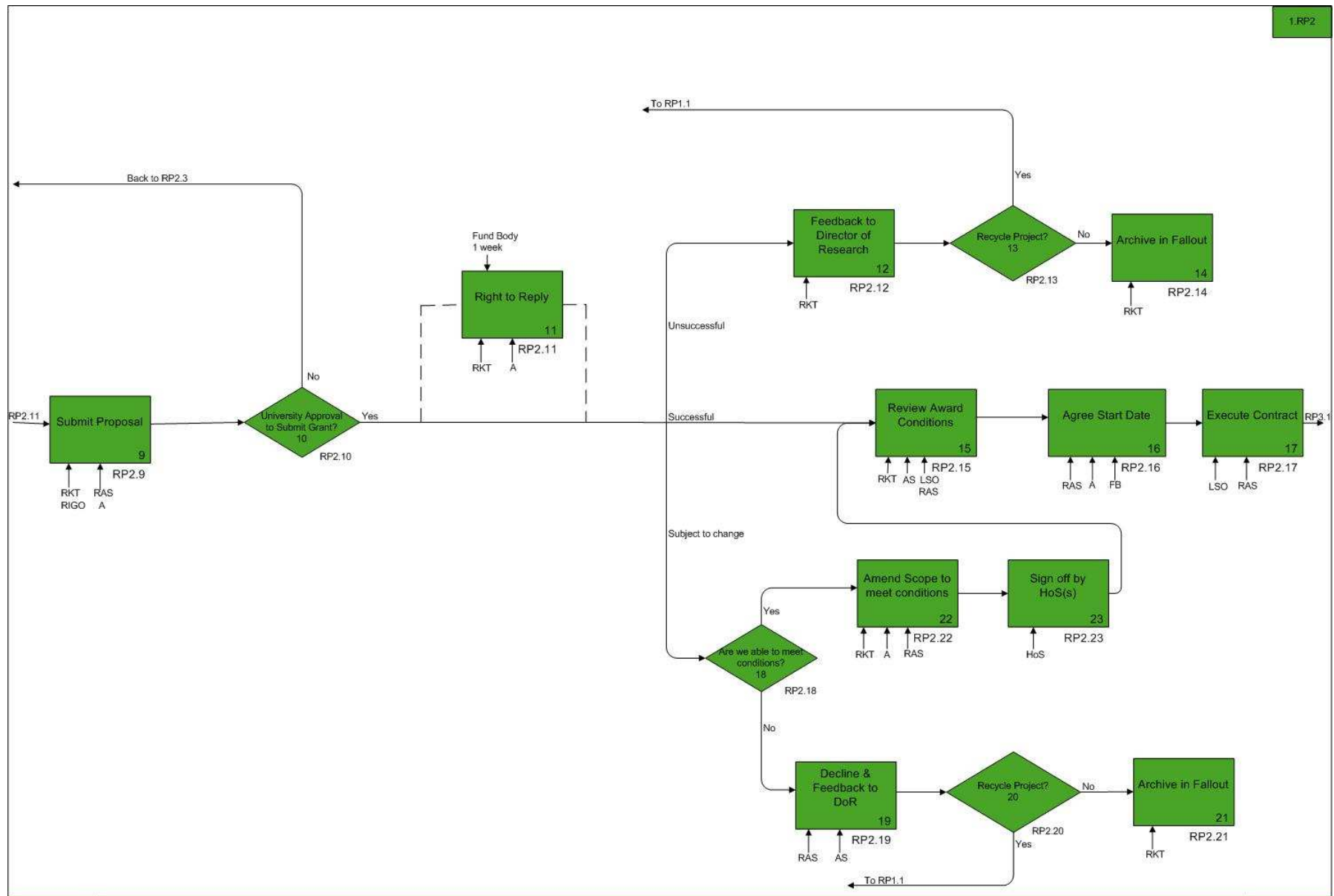


Research Projects Process



<ul style="list-style-type: none"> RP 1.1 - Develop Project Scope RP 1.2 - Complete Concept Form RP 1.3 - Add to Register & Set Up File RP 1.4 - Assessed by RKT Decision Tool? (Under Review) RP 1.5 - Can the project be re-scoped? RP 1.6 - Feedback to Director of Research RP 1.7 - Archive in Fallout RP 1.8 - Complete Risk Questionnaire RP 1.9 - Agreed by Academic School? 	<ul style="list-style-type: none"> RP 2.1 - Assign Project Team RP 2.2 - Project Plan RP 2.3 - Scoping Workshop RP 2.4 - Develop Budget RP 2.5 - Fill out Application Form RP 2.6 - Check Draft Budget & Application RP 2.7 - Internal Peer Review? RP 2.8 - Finalise Bid RP 2.9 - Submit Proposal RP 2.10 - University Approval to Submit Grant? RP 2.11 - Right to Reply RP 2.12 - Feedback to Director of Research RP 2.13 - Recycle Project? RP 2.14 - Archive in Fallout RP 2.15 - Review Award Conditions RP 2.16 - Agree Start Date RP 2.17 - Execute Contracts RP 2.18 - Able to meet conditions? RP 2.19 - Decline & Feedback to Director of Research RP 2.20 - Recycle Project? RP 2.21 - Archive in Fallout RP 2.22 - Amend Scope to meet conditions RP 2.23 - Sign off by HoS(s) 	<ul style="list-style-type: none"> RP 3.1 - Review the Project Team RP 3.2 - RKT Project Review RP 3.3 - Are Contractual Changes needed? RP 3.4 - Contract Amendment 	<ul style="list-style-type: none"> RP 4.1 - Contribute to the End of Project Report RP 4.2 - Review the End of Project Report Final Budget Summary RP 4.3 - Conduct RKT End of Project Review RP 4.4 - Are there any new projects? RP 4.5 - Request Archiving of Project Documentation
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The Role of Triage



Help Will Not Help

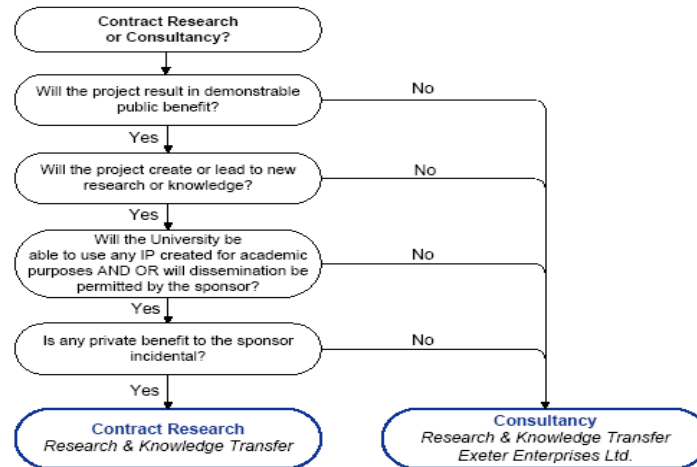
Help Will Help

Help Will Help Later

Decision Support



WHAT is the difference between **Contract Research & Consultancy**?



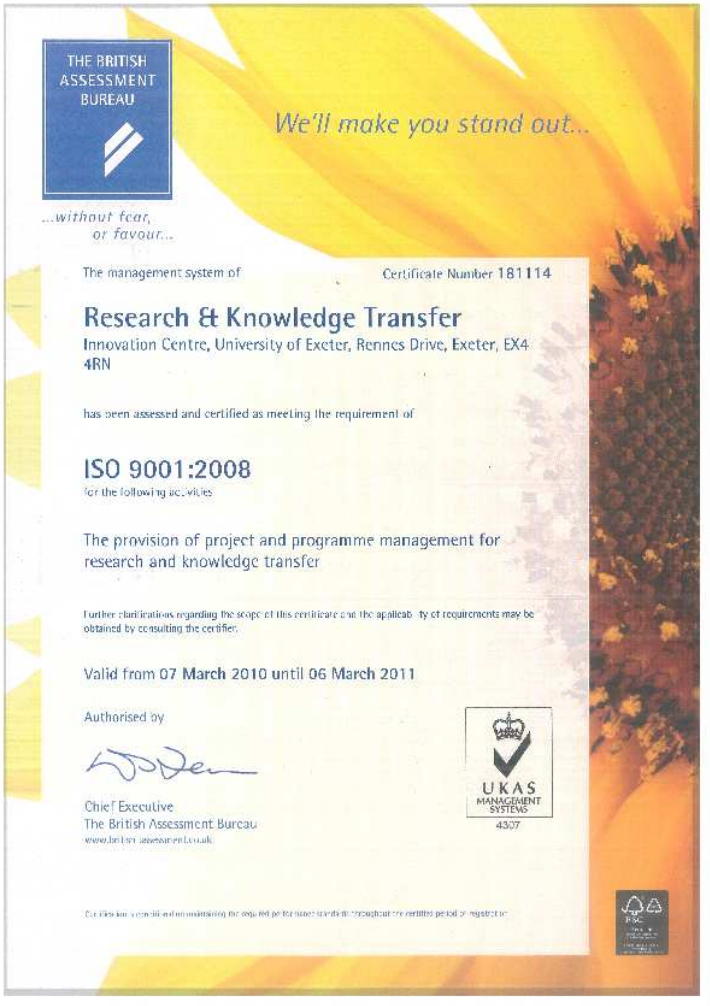
ANY QUERIES?

Contract Research - Talk to Dawn Scott on 01392 725474, d.m.scott@ex.ac.uk

Consultancy - Talk to Rob Watts on 01392 264373, r.j.watts@ex.ac.uk



Quality Management

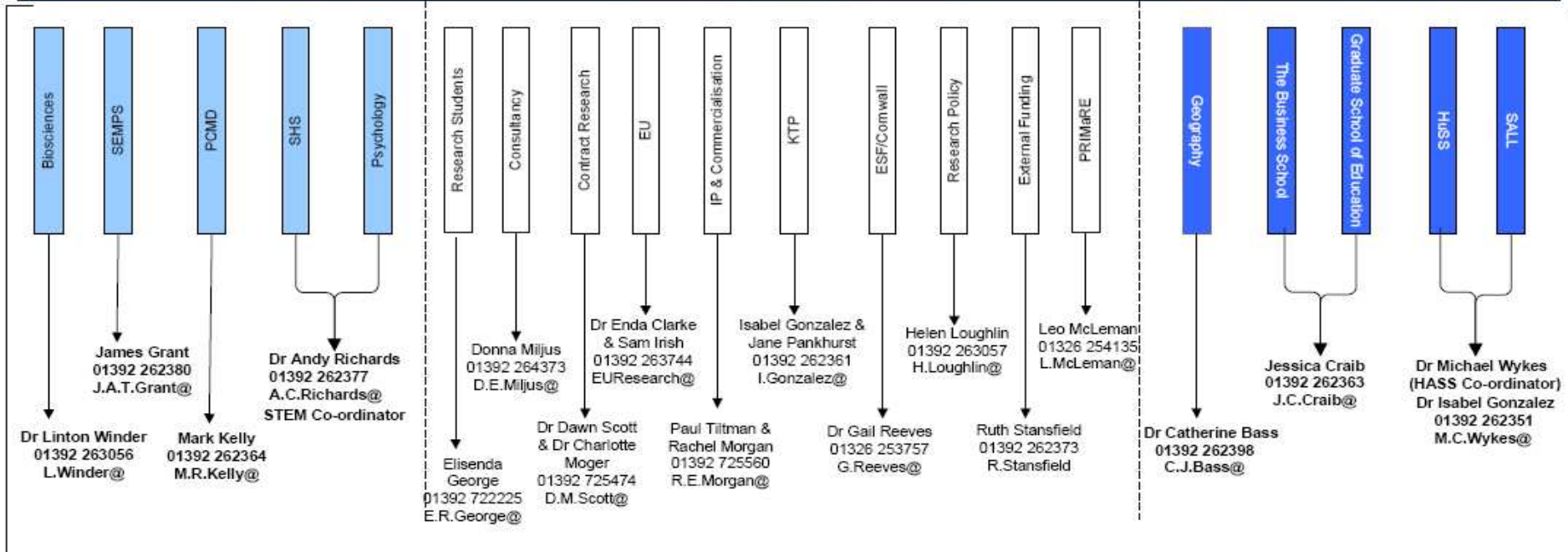


Research & Knowledge Transfer

STEM & M

ACADEMIC SCHOOLS

HASS



PROJECT SUPPORT

Events - Information & Data Management - Business Relations - Sponsorship

Director - Sean Fielding
 Head of Operations - Allen Alexander
 Senior Project Support Manager - Eleanor Kennedy



QUESTIONS



Allen Alexander
Assistant Director, Research & Knowledge Transfer
University of Exeter

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