

# **Knowledge Management Maturity Model for Consulting Companies**

# Introduction

Welcome to this introduction of the Knowledge Management Maturity Model. This model has been created to help consultancy companies to assess how well they manage knowledge.

At uman, our teams are in daily contact with a huge range of consulting companies, from digital and communication agencies, to management consultants and information technology companies. In fact, any company that sells and delivers complex and specialist services to its customers.

While we're helping them to improve and automate their internal knowledge management, we find out about their capabilities, day-to-day problems, and also the wins.

Through these conversations and our past experiences of working within and for consulting companies, we have identified distinct levels of maturity when it comes to knowledge management: levels which clearly show how a company is dealing with the challenges, the pain points that are arising, and the benefits that are enjoyed with a successful approach.

# But first, what is Knowledge Management?

The term knowledge management refers to the way a company organizes, structures and uses its knowledge related to projects, proposals and people. This spans the creation and sharing of files such as reports and presentations, as well as the organization and retrieval of information like statistics or research.

Only by sharing information internally can people collaborate and do their jobs efficiently, learning from each other and building on the experiences of other people and teams.



# A good knowledge management strategy matters

We've all experienced situations like these:

**Looking for relevant case studies. Searching for industry experience. Pulling up old proposals. Taking over from a colleague and searching for files. Wondering about guidelines. Developing the next stage of a project...**

Knowledge sharing and management touches almost every aspect of a working day. It's the key to making the most of the hard work that goes on in a company, using talent and avoiding wasted time.

With an efficient system, everyone can quickly lay their hands on useful knowledge and there is no need to duplicate efforts and reinvent the wheel. For commercial teams, this means a lower investment of time and money in presales trajectories, a rise in win-rates and more cross and upsell opportunities. Beyond that, the company will experience faster onboarding times, more learning opportunities, reduced bottlenecks caused by senior personnel being the only source for existing information, and protection against the risk of knowledge being lost if an employee leaves.

At the core, knowledge-centered companies rely on their people and their collective and historical output. The way this is stored, aggregated and shared has a major impact on processes, productivity, success rates, efficiency and continuity.

Reasons enough for a good knowledge management strategy, no? Let's look at the different stages of maturity so that you can see for yourself.

# The Knowledge Management Maturity Model

Let's start with some definitions to lay the groundwork for the model: **3 Basic Cornerstones**. To start with, we believe that every progression towards maturity in a company has steps to take in three essential cornerstones: **Organization or Culture, Processes and Tools**.



## Organization

Or culture. This pillar represents the backbone of a company. It's the structure, the goals and the values that drive its success. It's how a business is run and managed.



## Processes

The well-oiled machine that keeps the business running smoothly. These processes ensure that everyone is on the same page, providing clarity and structure to all.



## Tools

These can range from the tried and tested methods of hard work and human ingenuity to cutting-edge software solutions that streamline operations. The right tools are crucial.

All 3 aspects affect the ability of a company to build a strategy to improve and mature knowledge management. Now, we only need a scoring model.

# 3 Scoring Parameters

For organizations like consultants, that handle (and share) a lot of knowledge, we have learned it is possible to assess their maturity based on **3 aspects** :



## Accessibility

pertains to the openness and availability of information, technology, and resources. It also includes security considerations like measures taken to protect resources against unauthorized access.



## Findability

tells us how easy it is to find and retrieve company resources and information that should be readily available. Additionally, we're looking at re-usability of content, like building blocks and templates used multiple times in different contexts.



## Quality

concerns the assurance of the availability of correct and up-to-date information. On top of this, it should be possible to evaluate the way knowledge is used, identify existing gaps, and act on these measurements.

Getting a grip on how a company is doing within these parameters instantly tells you how efficiently and effectively they deal with the information that is flowing through their organization and its people.

# Knowledge Management Maturity Levels

Through hundreds of conversations with consulting companies, we have seen that they fall into distinct levels of knowledge management maturity. We have customers within each level, and we help them to step up to greater maturity. Let us walk you through the maturity levels and see what's really going on within each one:

	level 1 <b>Unaware</b>	level 2 <b>Collaborate</b>	level 3 <b>Automate</b>	level 4 <b>Conquer</b>
<b>Accessibility</b>	Local files, no control or birds-eye view at management level	Shared collaboration spaces, standard operating procedures for information location and access rights	Standard operating procedures stay, but become more lightweight. AI automates tagging etc.	Standard operating procedures are even more lightweight. AI automates tagging etc.
<b>Findability</b>	You only know what you've worked on yourself	Overload of information & complexity of tools. Need to ask colleagues. High level of reinventing the wheel	Centralized, intuitive system. Instantly findable & reusable references, materials, experts, ...	Centralized, intuitive system. Instantly findable & reusable references, materials, experts, ...
<b>Quality</b>	No awareness of the quality of content	Low awareness. One notion of potentially outdated information. Some ownership, but not set in stone	High awareness around the need to control quality. Ownership and process is defined, but not yet scalable. Tools & processes are implemented	Governance of ownership, quality classification levels, Measurable knowledge gaps, content quality labeling at scale.

Level 1

# Unaware

This phase is typical for companies that have only been around for a couple of years and are growing steadily, or that have been growing a lot recently. At this point, it becomes extremely painful that the main knowledge management principles have been neglected.

## Pain

People within the organization are experiencing multiple symptoms that largely have their origin in organizational shortcomings of which the management is not (yet) aware.

Everyone's personal creations are being saved to personal drives without any guidelines concerning structure, naming or tagging

Colleagues experience frustration and confusion around where to find information and what is acceptable or suitable for reusing and building upon.

Valuable work tends to get lost and forgotten because after finishing a project, there is no pressure to upload or share what has been produced. People and teams have no incentive to work together, and those that want to realize they have no shared collaboration spaces available for this.



# Impact

The biggest impact of these issues is a disorganized and fragmented approach to managing knowledge. Confusion is rife amongst employees due to the absence of a classification system for documentation. This leads to questions like where to store specific data, whether it can be shared and what happens to the information when an employee departs, particularly in the case of senior employees. The want of clear processes for managing information creates inefficiencies and limits the ability of the organization to leverage its knowledge assets and support growth.



## Organization

There are no structures in place for managing and taking ownership of information. Despite the fact that the company is evolving quickly, there is no awareness at management level about the importance of a strategy for information sharing and collaboration.



## Processes

We see a general absence of agreed processes and policies to govern the flow of data. The lack of a classification system for documentation creates uncertainty among employees about the sharing of information for client-related projects, leading to questions such as where to store specific data, whether it is allowed to be shared, if it should be anonymized, and what happens to the information when an employee leaves.



## Tools

The final nail in the coffin in terms of effective knowledge management: there is no comprehensive vision for tooling. People choose different tools at random, by personal preference or by team consensus, and too many times, documents are stored on personal drives or local computers. There is an absence of central storage locations for documents, such as shared drives or MS SharePoint, and without solutions for (inter) team collaboration, information is fragmented.

# Score

Let's take a look at the parameters we set out at the start and the score we can give to this rather chaotic situation.



## Accessibility

Files are stored locally. There is no awareness on management level around knowledge management. Resources and tools are not connected in any way, with no central view of existing resources as a consequence.



## Findability

At this level, people only know what they have worked on themselves. When someone is in need of other information, they have a hard time locating and retrieving it, wasting extra time and resources in the process.



## Quality

There is no awareness around what content is qualitative enough for what purpose. It is not clear what's up to date versus outdated, or even what is on- or off-brand.



# Outcome

The Unawareness Phase presents a significant challenge for growing companies, but it also represents a substantial opportunity for growth and improvement. It's almost akin to pioneering, with every chance to start from zero, improve efficiency and drive growth.

The positive is that it is relatively straightforward to start fixing this and get to the next maturity level. What's needed is to define collaboration spaces and corresponding governance processes. You should also start thinking about permissions and a security policy for the next round. You got this!

## Phase 1 example: Sitrocons Ltd.

Sitrocons is a 5-year old consultancy company that has been growing with double digit figures since its start. At the moment they have 22 employees, of which 18 are consultants. Sales and business development are being done by the founders and consultants in their unbillable time. Since all focus during the past years has gone into growth, no real structures are yet in place for internal knowledge management.

The firm is still small enough that sharing and collaboration is mostly done on an ad-hoc, face-to-face basis. People message and speak to one another for help and advice about available information when they're available. There are no real processes in place on how to govern the flow of data within the organization, which hinders the ability to effectively leverage existing company knowledge. Documents are still stored on personal drives or local computers because of the absence of central storage locations. The lack of tools makes organizational and process-related shortcomings even more visible.

The management team at Sitrocons doesn't have a pressing need to implement a formal information strategy, but as the organization continues to grow, this will become increasingly critical to its future success.

# Collaborate

When your company has arrived in this phase, you are aware that things had to change. You've sorted out the basics of your internal knowledge management and enabled your teams to collaborate in central places.

## Benefits

The company has created shared collaboration spaces and used tools like Sharepoint, Teams, Shared Drives or a CRM to enhance productivity. Now, people can access their files from anywhere, at any time. There are now processes in place that decide on what kinds of data is in the systems, where it should be stored, what can be shared and who is responsible. On top of this, basis permission sets are being rolled out to regulate the authorization access to information.

## Pain

However, with all these extra processes and tools, you still feel the pain of a lack of efficiency and it still takes time to gather qualitative knowledge which is consistent and up to date. There is now an overload of information and a complexity which is certainly not helping. The fact that you're still working with siloed teams or divisions, that have particular jobs to be done and targets to reach, doesn't improve the findability and collaboration. Having everything available doesn't mean it is findable.



# Impact

The impact of these issues is clear in the loss of efficiency and time in, for example, the sales process. The fact they have to work with incomplete and scattered information makes them prone to reinvent the wheel every time, resulting in a higher pre-sales cost and lower billability and win-rates. It also shows a higher complexity when onboarding new team members. At companies with multiple, large business units, there is also a lack of cross-selling as knowledge is still siloed.



## Organization

There is a good awareness when it comes to knowledge management, so structures like Competence Centers are put in place to fix the problems at hand. It's not enough however, and the company still relies heavily on senior people as a source of information.



## Processes

Companies are putting processes and structures in place. They're creating things like Standard Operating Procedures, naming conventions, tagging guides, folder structures. .



## Tools

With the combination of tools and process, companies are trying to fix the issues manually. They have intranets, templates, references sheets, ... at their disposal. However, issues still remain with scaling the manual effort, as well as the discipline needed.

# Score

Let's dive into our parameters and see if we can already put a higher score on some.



## Accessibility

Solutions are implemented that connect existing content sources and make sharing possible. Processes and standard operating procedures are in place for information location and access rights are set for the users.



## Findability

There is now an overload of information and a complexity of all tools where information could be found. People are reverting quickly to asking senior colleagues for existing content or having to reinvent the wheel every time.



## Quality

There is no awareness around what content is qualitative enough for what purpose. There is some notion of potentially outdated information, and because of improved organization, there is some ownership, although it is not set in stone.

# Outcome

Concluding this phase leaves us wanting more. Great progress has undoubtedly been made, but it is quickly blocked by scalability and the limited quality of what can be found. Most of the initiatives are based on a snapshot of one or multiple information systems, which makes them vulnerable in terms of authenticity and accuracy. Moreover, they require immense effort to maintain because information needs to be extracted, blended and transformed. Due to these pitfalls, these initiatives don't often last long and companies start to pursue a way out by turning to automation.

The lack of measurement in this phase also means companies push forward without seeing the bigger picture and aren't able to see the valuable return on their efforts. Companies will start to investigate a more rigid way to tackle this problem, which will require more integration between crucial information components and extra tooling.

Moving into phase 4 will solve the issue of scalability and unlock knowledge management nirvana.

## Phase 2 example: ParaConstra nv

In nearly two decades, ParaConstra has established a reputation as a leading player in their industry, with 100 consultants delivering exceptional services. However, as they continue to grow and expand their offerings, they have been bogged down in the amount of effort required to access information and chase colleagues for insights and back-stories. There is a lot of work involved in governing excel sheets and folders, to ensure the latest knowledge is always available. For all these reasons, the company has recognized the need to streamline their information management and commercial efforts.

To this end, ParaConstra organized their business into competence centers, tasked with not only creating and maintaining information sources, but also sharing that knowledge throughout the organization. To ensure that this process runs smoothly, they established Standard Operating Procedures to guide the handling, storage, tagging, naming, and categorization of information. Through the implementation of excel templates and reference sheets, along with the addition of an intranet, they were able to effectively manage the vast amount of information generated by their team.

While these tools and processes have solved the issue of information integration and accessibility, ParaConstra management now sees that scalability and quality control are becoming an increasing issue as they continue to grow. Their competence leads can only manage the flow of knowledge for so long, and so a new watertight solution needs to be explored.

# Automate

By now, your company has learned a great deal about knowledge management. Operational structures and processes have been put in place in the previous phases. However, as the business grows, you encounter new problems in your knowledge management. Your knowledge management tools and processes don't seem to be able to scale at the pace the rest of the company is moving.



## Benefits

It's becoming increasingly important to adopt a more modern and efficient approach to knowledge management. The key lies in embracing automation, like an AI platform, to help streamline processes, reduce manual labor and errors, and improve overall efficiency. An AI assistant that connects with your current tools and automatically monitors and structures your information. This enables effective collaboration and information sharing. The right AI solution will connect all your existing tools, bring structure and make sure all your knowledge is readily findable and re-usable.

The most apparent benefit of embracing this innovative solution is the huge win in efficiency. On the operations side, you will see things like higher win-rates in your sales trajectories, lower pre-sales cost and faster onboarding of new employees. Why is there such a leap in efficiency? Well, existing knowledge is re-used and people build upon that knowledge, including processes and best practices. So they are not working in silos anymore or starting from scratch when they are faced with a challenge.

## Pain

What is still stopping you from being top of your game is an adequate way to control, verify and qualify the existing knowledge at scale. Now that you have unlocked the findability of all of this information and knowledge within the company, your current quality curation processes and tools can't catch up with the growth of this stash of valuable information. To keep quality curation going, there is a heavy burden on human efforts.

# Impact

As a consequence, we see important quality issues that can hinder efficient sales or presales processes. People are working with off-brand information which should not be shared with customers. There's also the risk of using outdated or confidential pricing or terms & conditions in contracts which could lead to legal issues. If you look at consultants instead of sales people, the issues can be even worse. It could result in terrible quality of service when they're using outdated approaches, frameworks or other materials to create their customer deliverables.

## Organization

The silo problem has been solved and people like competence leads are put in place to guard the quality of content. However, it is still just the basis of quality. There is awareness, but no documentation of what is 'good' or 'bad'. The company relies on the judgment call of competence leads, but they cannot handle everything.

## Processes

The standard operating procedures and other processes are still in place, but are now automated, so the workload for the teams is reduced. The problem is that the process for new versions or the mention of outdated information will not be communicated company-wide every time. By consequence, judgment calls have to be made every time someone uses a document. Or they ask senior people, putting an extra burden on their workload.

## Tools

As for tooling, it is clear that embracing innovative technologies has streamlined and automated key processes. You leverage the power of artificial intelligence to optimize your knowledge management strategy, increasing efficiency and freeing up valuable resources. However, while you made the processes scalable, there is still the need for quality control, which needs a human touch.

# Score

Let's take a look at the parameters again. We see 2 out of 3 being blue, so you're nearly there.

## Accessibility

Solutions are implemented that connect existing content sources and make sharing possible. Processes and standard operating procedures are in place for information location, and access rights are set for the users.

## Findability

Everything you need is now centralized, intuitively and instantly findable by everyone in the company, independent of the team they're in. Search Valhalla. There is a huge win in efficiency in all content creation that makes use of work-to-date and builds on it.

## Quality

There is a high awareness of the need to control the quality of information. The ownership is defined in the organizational structure and the process is in place. What is not optimal is the scalability of the tools and processes when it comes to the quality of individual documents.

# Outcome

Score! You have achieved a significant milestone in your journey towards a robust and effective knowledge management strategy. By reaching level 3, you have demonstrated your commitment to transforming your organization's approach to knowledge management. You now have a scalable and efficient system in place, but there is still room for growth and further gains.

As you embark on this next phase of your knowledge management journey, it's critical to keep a tight rein on the AI tools that you are integrating into your organization. Can you keep control over the quality of your knowledge? Mastering this is the ultimate challenge in knowledge management maturity and mastery.

## Phase 3 example: Conshelmy SA

The year Conshelmy celebrated their 25th birthday, it was decided something needed to be done about the knowledge going rampant on its internal systems. As a consultancy firm, they had been creating new documents for years, which had all been nicely ordered in folders and received structured tagging and naming with the help of processes and knowledge managers. But the effort of all these processes became too much. There was a rampant growth in data that became uncontrollable. With all this and getting stuck in the wheels, people were getting frustrated when they couldn't lay their hands on the right documents, had to work with outdated input and saw confidential information becoming available to unauthorized staff.

Most of the frustration left the building with the implementation of an intelligent knowledge management platform. The solution, running a powerful AI, was easily set up by connecting all relevant tools and giving it some guidance into where and what it could find. All that remained was for the teams to embrace it. All processes and strategies set in place before were now used for an efficient and scalable tool that makes it easier to find, access, and reuse information. The automation, with the help of the AI, replaced the manual maintenance of their intranet, folder structures and reference sheets - freeing up 3 FTEs in the process. On top of that, the use of company knowledge also became measurable. Competence leads were able to monitor the performance of specific information and processes and act upon this.

We're looking at an organization that has everything in house for a future-proof knowledge management strategy. They just need to keep human insight in the equation.

Level 4

# Conquer

Congratulations on reaching the pinnacle of knowledge management maturity – Stage 4. This is a major accomplishment that only a select few organizations have been able to achieve. To fully realize the benefits of your knowledge management strategy, it's essential to establish clear control mechanisms that ensure effective and efficient collaboration between your AI assistant and human team members.

## Benefits

Everything is findable and accessible, and on top of that, is also verified. With the unique combination of AI and human curation, your organization has 100% control over what information is being used and what is not. All individual users can easily see what information can be used in what circumstances. There is ownership over the whole information governance process.





# Impact

At this stage, you have the ability to govern your knowledge efficiently and at scale, while still maintaining the highest standards of quality, control, and confidentiality. Everyone within the company has total confidence in their ability to find and take advantage of the collective knowledge.

## Organization

The governance process and ownership are crystal clear: which competence leads are responsible for what expert domains and the information within these domains. They control the quality of information, knowledge gaps, expert details, and so on.

## Processes

All classification levels of information are defined (outdated, recommended, off-brand, confidential) and it is understood how they should be used by everyone in the organization. There is also an agreed process when it comes to the measurability of information usage. This allows you to set KPIs and monitor the performance of specific information.

## Tools

The combination of human insight and AI now gives you the ability to measure usage and react to it. You could label documents or parts of documents at scale based on this information. The tool should also be able to make all processes and ownership transparent to management.

# Score

Our scoring parameters are now green on all fronts. An absolute win!

## Accessibility

Solutions are implemented that connect existing content sources and make sharing possible. Processes and standard operating procedures are in place for information location and access rights are set for the users.

## Findability

Nothing is missed or overlooked. Everything you need is now centralized, instantly findable and reusable by everyone in the company, independent of the team they're in. Search Valhalla. There is a huge win in efficiency in all content creation processes that make use of existing data.

## Quality

There is now established governance of ownership and quality classification levels. Content quality labeling at scale makes the use of existing knowledge much more trustworthy. Everything is measurable, so usage and knowledge gaps can be detected and acted upon.

# Outcome

Having reached this ultimate level of knowledge management, you truly conquer the knowledge and information that's present in the company, at scale and verified. The company has achieved ultimate ownership over quality and confidentiality, and has insights into the alignment of security and accessibility. Knowledge can be accessed intuitively and immediately, and then built on with new work — allowing a steeper curve upwards in the progress and achievements made.

## Phase 4 example: YourCompany NV

YourCompany is seen as the example of a successful consulting company with a minimum of churn in its customer base, loyal employees and a bright future. Many of these achievements have been supported and enabled by its efficient management of internal knowledge.

The organization is a well-oiled machine with slick collaboration and sharing between business units. In fact, up- and cross-selling seems natural. Consultants and commercial teams are used to discovering and re-using company information efficiently, without having to worry about security or quality issues. The AI-assisted automation with human curation model means that knowledge can be explored and re-used with ease. It has given back ownership quality and confidentiality, while still maintaining scalability and accessibility.

This is the future of work for YourCompany. By taking on board the AI-powered solution and making it part of their everyday business, they are taking full advantage of their talent and have a competitive edge.

# Conclusion

This Knowledge Management Maturity Model from uman has been created to help consulting firms – and indeed any company selling expertise to customers – to understand and improve the way they manage information. Our model slices and dices the knowledge management landscape into 4 distinctive levels, each with its own set of hurdles, and positive achievements. By determining where your company stands on the maturity spectrum, you'll have a clear roadmap of where to focus your efforts for the greatest advantage.

Embracing the automation wave in knowledge management is like fast-tracking to the future of work. By harnessing AI-powered solutions, you'll give your company a competitive edge and be able to stay ahead in your industry.

Let uman be your guide on this journey. With our AI assistant, you'll streamline your knowledge management processes, save time, and have more bandwidth for high-impact activities. In today's fast-paced business world, being a leader in the knowledge management game is more important than ever. Get a head start with the perfect fusion of human and AI efforts, to achieve complete control over your company's knowledge and the ability to make game-changing decisions.

**Come and join us  
on this exciting ride!**



# About uman

Uman's AI assistant helps consultancy companies towards developing an effective and usable knowledge management strategy. By using our AI technology, organizations can connect all their internal drives and tools & centralize their data. It makes finding and using the information easier.

The combination of AI and human curation makes for a unique partnership. Our customers obtain an instant and up-to-date overview of what is available and what knowledge is best to use for what purpose. It dramatically improves their document creation processes. They're not only finding what they were looking for, but the system will also give them the information they didn't even know they were looking for.

# Get in touch

Our door is always open to share knowledge, discuss bold ideas and meet new (h)umans. Feel free to reach out.



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