

W6

# Creating a KM Strategy by Collaborating With AI

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**KMWorld**

**Serious  
insights**

# Daniel W. Rasmus

How I do my work



Read, listen, read  
economist.co  
m  
newscientist.co  
m  
NPR.org  
FT.com  
Wired.com



Scenarios



Uncertainties

Continuous Learning



facebook

Community



Questions from Clients & Students

# W



Daniel W. Rasmus  
Strategist

Education



Career

Western Digital

Hughes



Poetic Moments



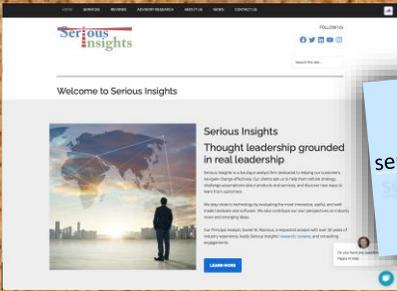
THE COMSTOCK REVIEW



BARROW STREET



Illya's Honey



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internet evolution

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CHIEF LEARNING OFFICER  
Solutions for Enterprise Productivity



# Serious Insights Experience



# Agenda

## Opening – 30 min

Reframing KM strategy as a living story.  
AI as partner, not prop—KM as AI's connective tissue.

01

## Exercise 1: Story in Place – 30 min

Map your organization's strategic narrative.  
Identify drivers, tensions, and opportunities. What are you trying to achieve? What are your goals? Use AI to explore your market.

02

## Exercise 2: Understanding Your Knowledge– 30 min

How is your knowledge different than that of competitors?  
What classes of knowledge do you need to leverage? How might that knowledge be applied better or more effectively to achieve organizational goals?

## Break – 10 min

## KM + AI Imperatives – 20 min

Why AI without KM is brittle.  
KM's evolving role in AI governance and sense-making.

03

## Exercise 3: KM Strategy Development – 40 min

Use AI to explore approaches to knowledge management for your industry and set of challenges. Use AIs collaboratively and iteratively.

04

## Exercise 4: Prompt & RAG Lifecycle – 40 min

Build a KM-aligned prompt and retrieval approach.  
Define creation, validation, and retirement cycles.

## Break – 10 min

05

## Exercise 5: Story-Driven AI Blueprint – 50 min

Co-create an AI-enabled KM strategy storyboard.  
Align people, processes, and systems with purpose.

## Thinking About the Future – 30 min

An introduction to scenario planning and how it works in strategies large and small.

## Wrap-Up – 20 min

Synthesize insights and common patterns.  
KM makes AI legible. How do you turn your strategy into a lived narrative.

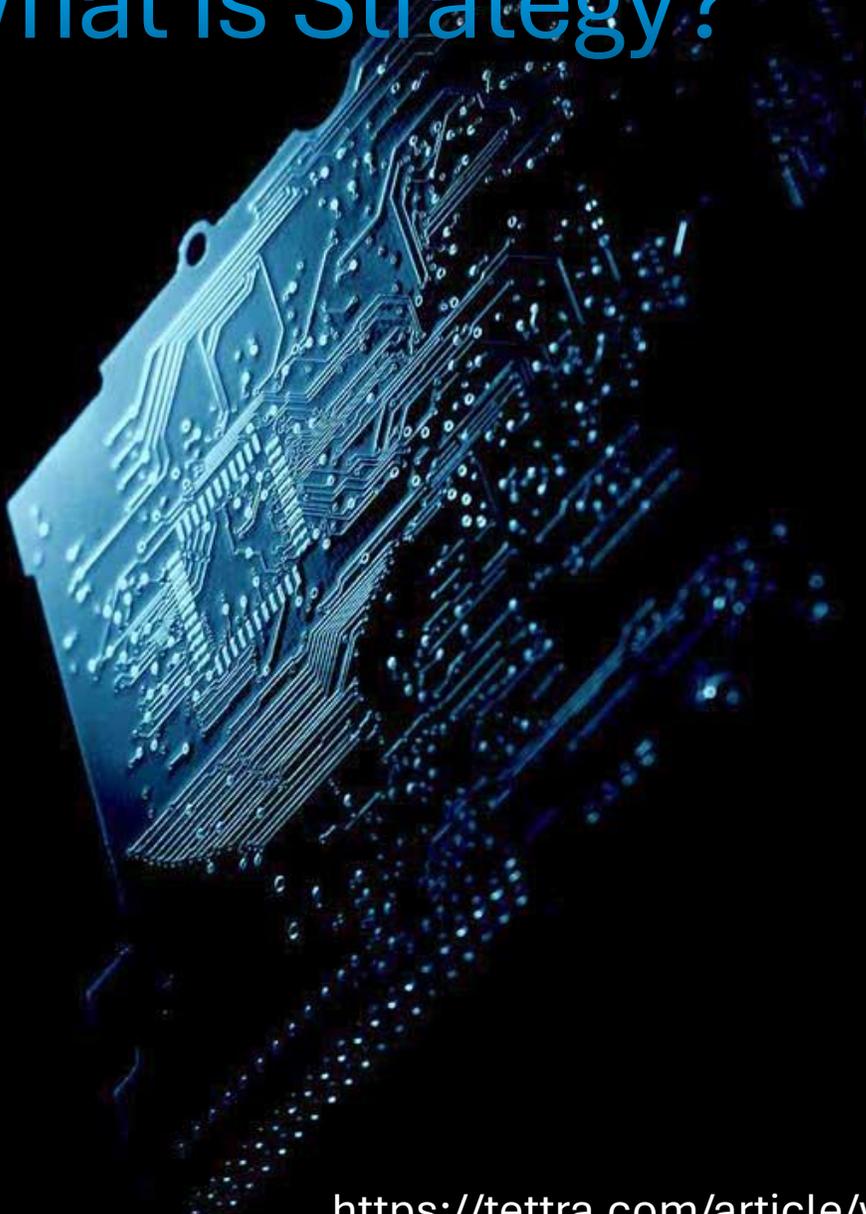


# Reframing Strategy

Should be:



# What is Strategy?

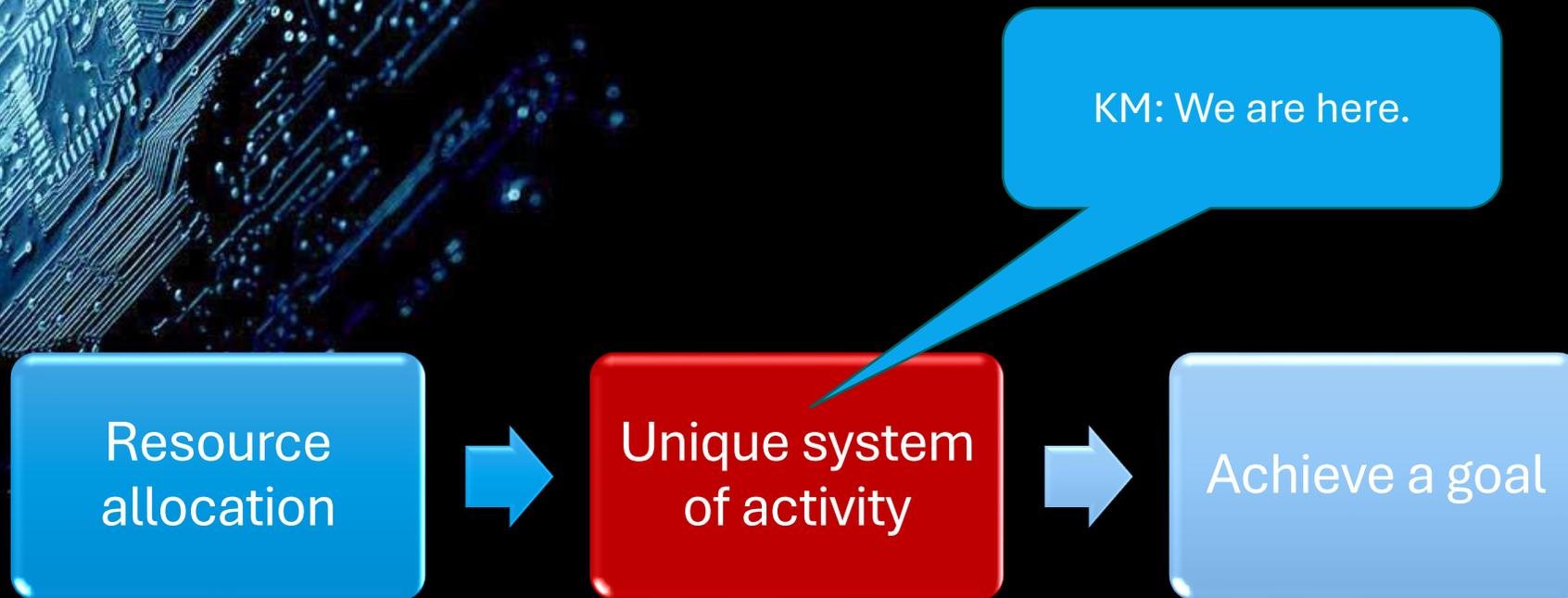


A knowledge management strategy is the framework by which the knowledge base will be built, from initial concept to company-wide execution. It is the roadmap that outlines the goals and how to achieve them, and which aligns everyone to the task at hand.

# What is Strategy?

Strategy is a coherent pattern of action that consciously intervenes in the ongoing evolution of the organization.

Strategy is how you plan to achieve a goal.



# Goal: Dominate the Commercial Military Satellite Market



Know more about our customers than our competitors



Leverage our Knowledge of Commercial Satellites

- Quality
- Capability
- Cost



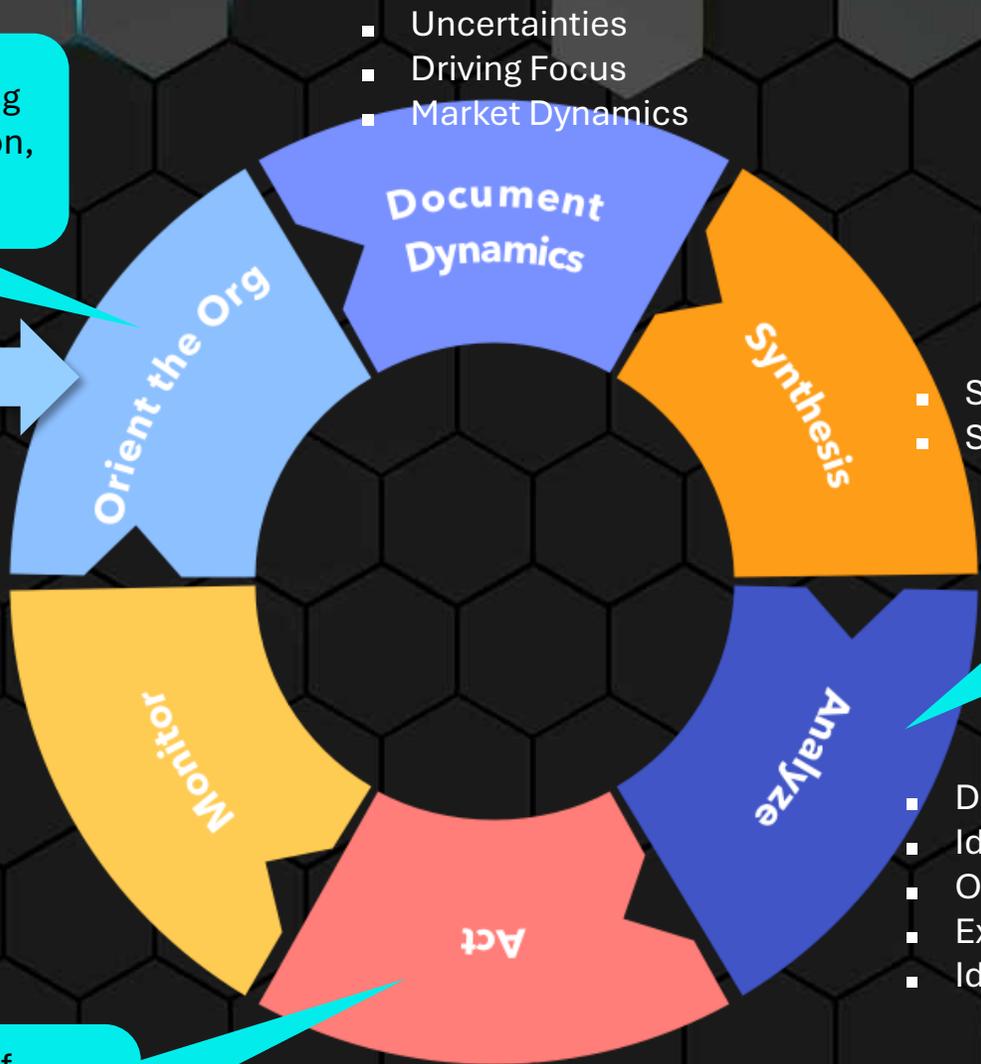
Create a Customer Intelligence System

- Meeting Notes
- Correspondence
- Preferences
- Personal Insights

A strategic conversation is a learning loop of perception, conceptualization, decision-making, and action.

Start Here →

- Interviews
- Focal Issue
- Understand the Current Purpose and Vision
- Defined Obstacles and Challenges



An organization is a community with a common purpose, which exist in a strategic conversation.

Strategy is a coherent pattern of action that consciously intervenes in the ongoing evolution of the organization.

- Chose a Strategic Position
- Place Bets
- Establish Partnerships and Lobbying Strategies to Reduce Uncertainty

"Leaders establish the vision for the future and set the strategy for getting there; they cause change. They motivate and inspire others to go in the right direction and they, along with everyone else, sacrifice to get there."

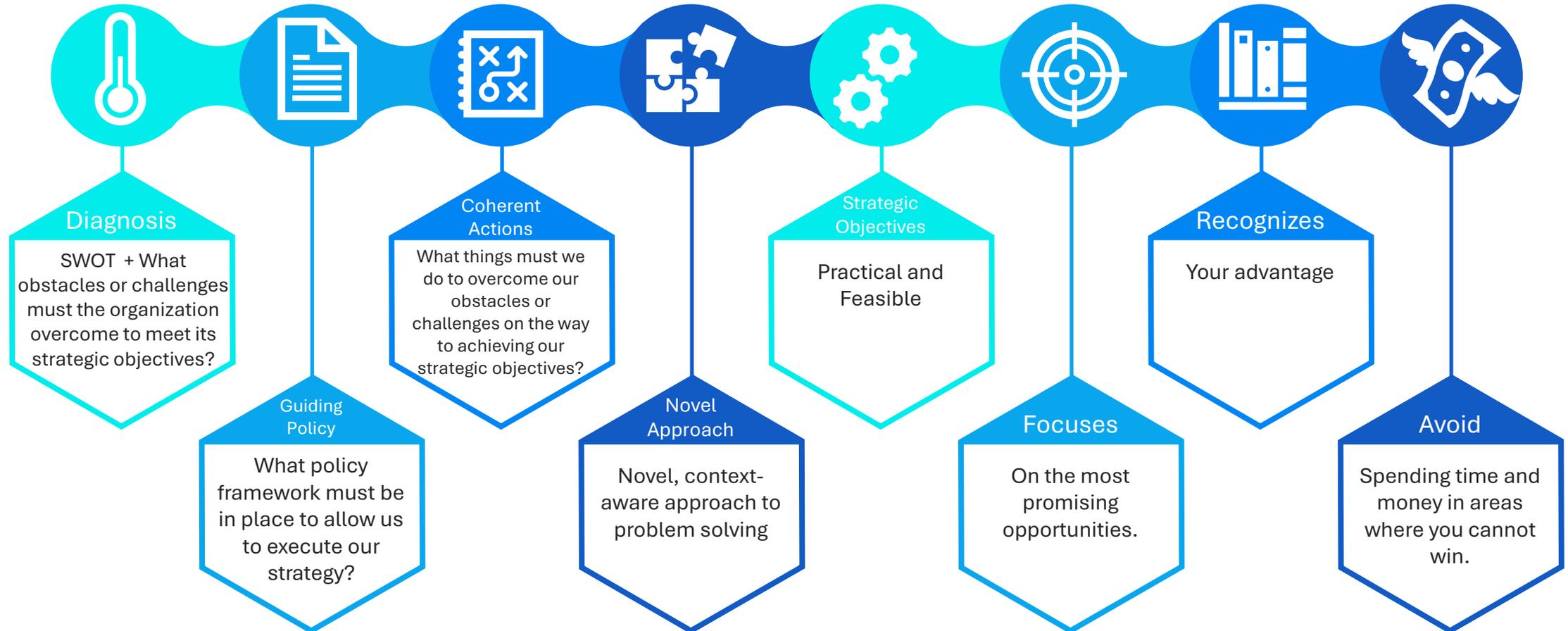
John Kotter, Harvard



**JOHN KOTTER**

John Kotter is an emeritus professor at Harvard Business School and bestselling author of **Leading Change** and **A Sense of Urgency**, and founder of **Kotter International**. His new book, with coauthor Lorne Whitehead, is called **Buy-In: Saving Your Good Idea From Getting Shot Down**.

# The Making of Strategy



# The Elements of a Strategic Plan

How

Strategic Objectives

Goals

Priorities

Action Items

What

Strategic Review

Mission

Values

Where

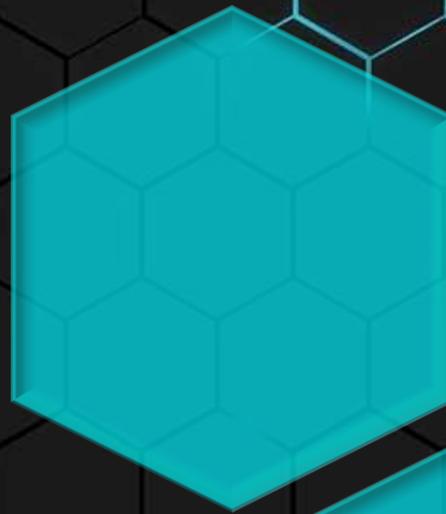
Vision

Competitive advantage

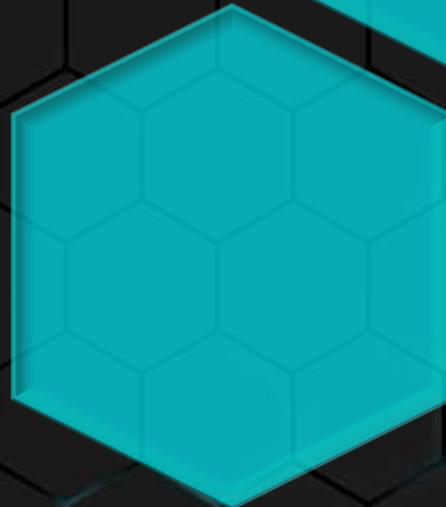
# A Strategy is not...

A Unique Value Proposition

A vision



- A technology plan
- Best practice improvement
- Agility
- Flexibility
- Innovation



- Mergers/Consolidation
- Alliances or Partnerships
- Outsourcing
- Downsizing

# Context: Diagnosis and Evaluation

Internal

## Capabilities

- Human capital
- Organization
- Knowledge

## Resources

- Financial
- Physical
- Intangible

## Processes

- Operational
- Customer management
- Relationship management
- Innovation

## Other

- Technology Management
- Communications
- Productivity
- Profits

## Current Customers

- Mix
- Satisfaction
- Loyalty
- Value chain
- Value proposition

External

## Environment

- Political
- Regulatory
- Social
- Technology
- Economic

## Industry

- Competitors (established and emergent)
- Substitute products
- Supplier strength
- Buyer strength

## Market

- Direction (growth/retreat)
- Absolute size
- New markets (as percentage of size)

## Competitors

- Who
- Strengths, Weaknesses
- Strategies
- Objectives



An organization is  
always in the act  
of becoming



**"The essence of strategy is choosing to perform activities differently than rivals do."**

**Dr. Michael Porter**



# **Public Sector Versus Commercial Strategy**

# Differentiating Strategy

## Public Sector

### Core Strategic Objectives

Maximizes societal impact, equity, and long-term policy goals.

### Jobs to Be Done (JTBD)

Addresses broad societal “jobs,” such as safety, infrastructure, and welfare, often balancing conflicting stakeholder needs.

### Resource Allocation

Driven by budget cycles, legislative approvals, and public accountability, limiting rapid resource shifts.

## Commercial Sector

### Core Strategic Objectives

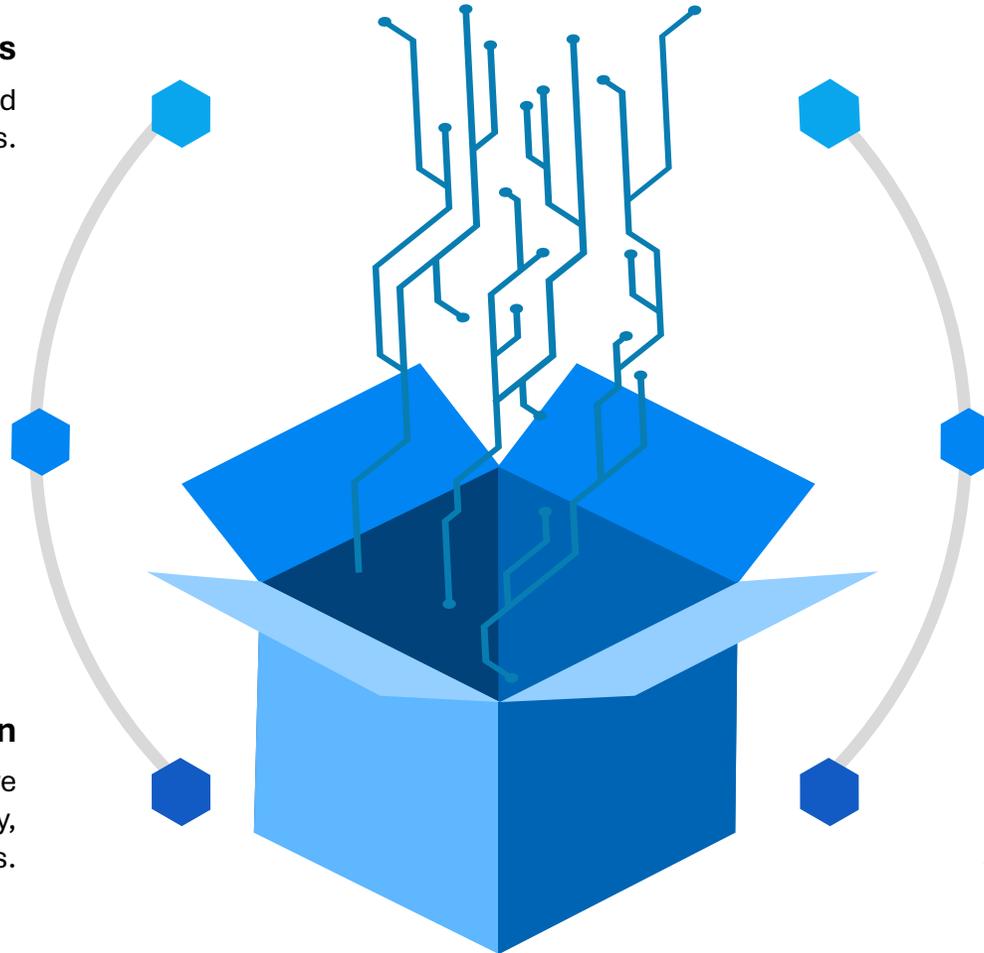
Focuses on profitability, competitive positioning, and shareholder value.

### Jobs to Be Done (JTBD)

Focuses on customer-driven “jobs,” optimizing products/services for market demand and growth.

### Resource Allocation

More agile capital deployment, using market signals and investment strategies to prioritize growth areas.



# Public Sector: Strategic Realities



# Unique Value Proposition



## Defenders of Intellectual Freedom

Libraries stand against censorship efforts, ensuring access to diverse viewpoints and protecting the right to read without restriction.



## Preservers of Cultural Heritage

By maintaining and providing access to a wide array of cultural and historical materials, libraries safeguard the nation's diverse heritage against potential political biases.



## Community Resilience Hubs

Serving as safe spaces, libraries offer resources and support during times of political and social uncertainty, fostering community cohesion.



## Nonpartisan Information Providers

Libraries offer unbiased, factual information, countering misinformation and supporting informed citizenry, especially crucial during politically polarized times.



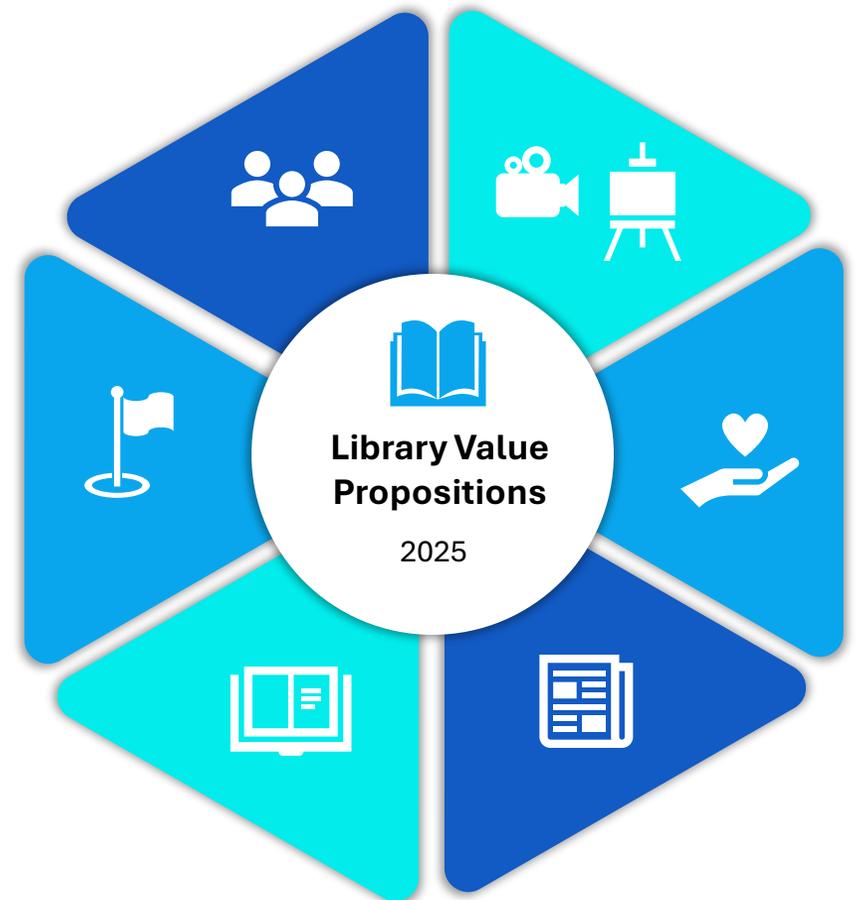
## Digital Literacy Advocates

Libraries provide essential digital literacy programs, bridging the gap for individuals affected by reduced federal support for technology education.

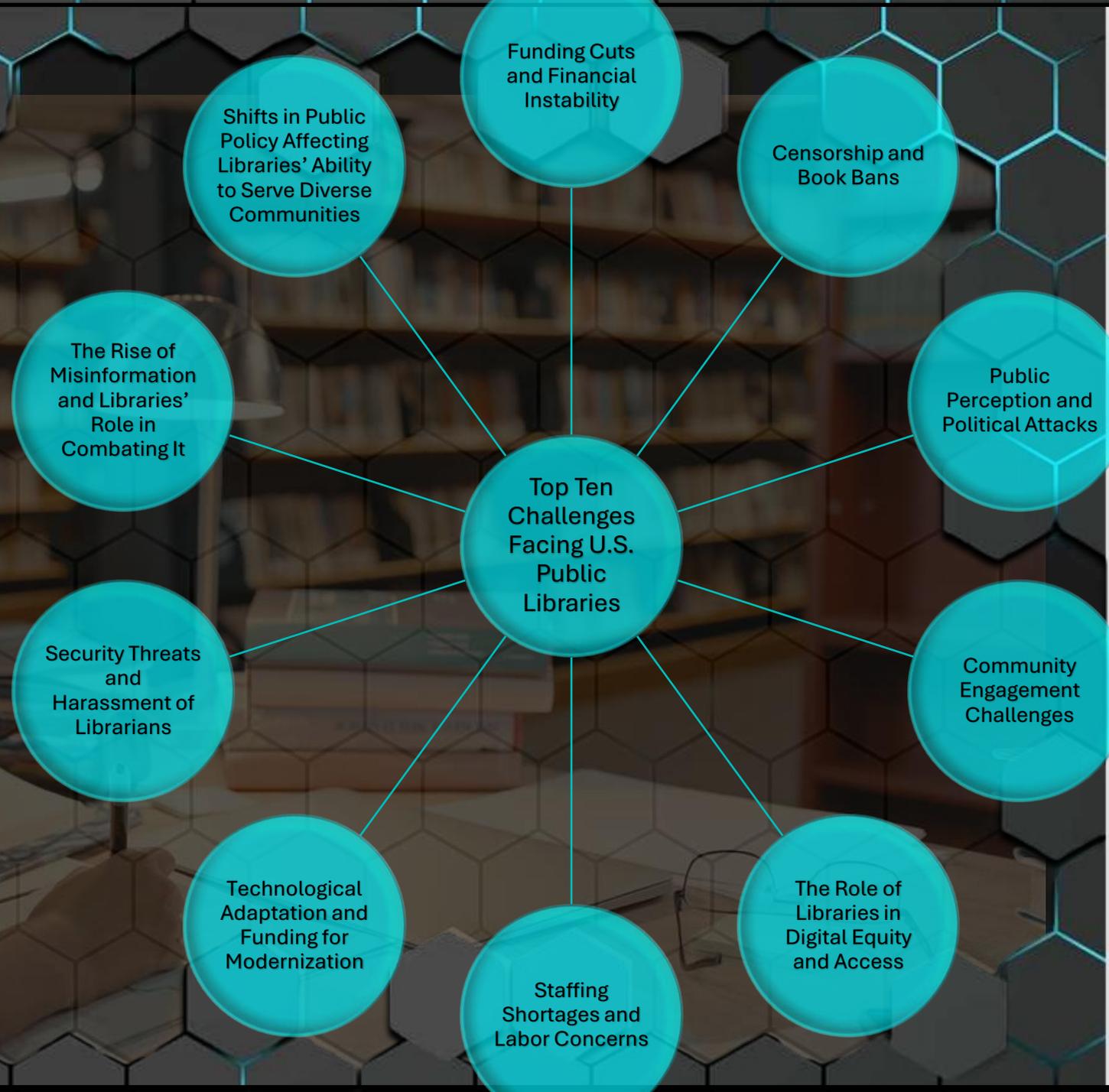


## Supporters of Marginalized Communities

Libraries serve as inclusive spaces, offering programs and services tailored to underserved populations, ensuring equitable access to information and opportunities.



# Libraries: Obstacles & Challenges



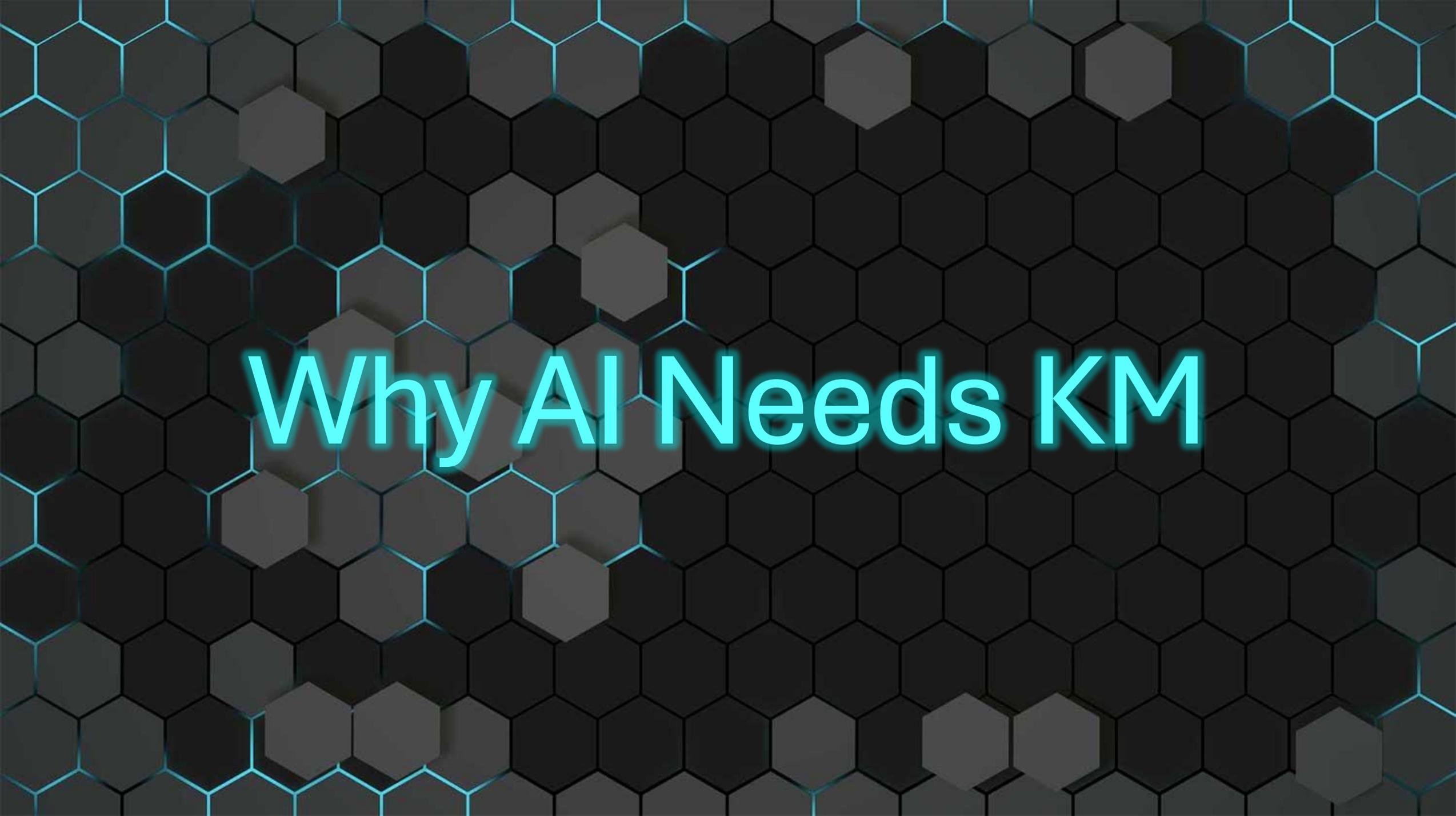
# Exercise 1: Story in Place

30 min

- Map your organization's strategic narrative.
- Identify drivers, tensions, and opportunities.
- What are you trying to achieve? What are your goals?
- Use AI to explore your market.

# Knowledge Obstacles For Retail

- ▶ **Fragmented data estate.** POS, e-commerce, loyalty, CRM, supplier portals, and store ops live in islands. Batch integrations hide latency, inconsistencies, and gaps that derail real-time decisions.
- ▶ **Shaky product truth** Item masters, attributes, rich content, and images diverge across PIM, DAM, and vendor feeds. Small errors (size, fit, care) cascade into returns and support load.
- ▶ **Identity fog.** One customer across web cookies, app IDs, email, and loyalty numbers rarely resolves cleanly. Consent versions and marketing preferences drift.
- ▶ **Inventory ambiguity.** “Available to sell” vs. “available to promise” vs. “actually on the shelf.” Store-level accuracy and shrink blur omnichannel promises.
- ▶ **Tacit knowledge loss.** Associate know-how, visual-merch tips, and workaround lore stay local. Attrition and turnover erase it.
- ▶ **Content sprawl/** PDP copy, help articles, policy docs, training, social replies—duplicated, off-brand, and out of date; search can’t find the latest.
- ▶ **Supplier blind spots.** Vendor performance, compliance, and sustainability data are partial or late; onboarding lacks a standard data contract.
- ▶ **AI without guardrails.** Chatbots and copilots hallucinate specs or policies when the source corpus is a mess; no retrieval policy, no evaluation harness, no red-team culture.
- ▶ **Governance drag.** No single owner for taxonomy, definitions, and retention; metrics fight (e.g., marketing vs. operations) blocks shared truth.
- ▶ **Privacy and policy risk.** Regional rules (GDPR/CPRA, kids’ data, returns data) collide with personalization ambitions; retention and deletion are uneven.
- ▶ **Measurement myopia/** Over-indexing on short-term conversion hides knowledge value: fewer returns, faster training curves, lower contact rate.



# Why AI Needs KM

# AI's Role in Strategy



## AI as a Strategic Component

AI as a visionary element in the strategy articulation.

## The Strategy for the Use and Deployment of AI

What is our AI Strategy?

## AI to Help Execute Strategy

AI as a tool to accomplish strategic goals.

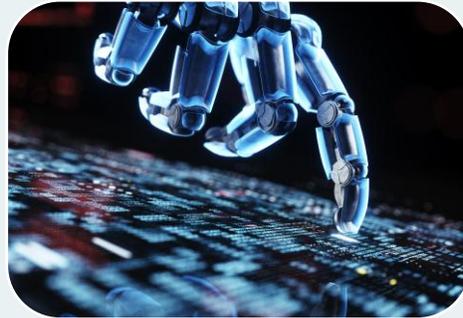
## AI to Support the Strategic Dialog

AI as a tool for research, challenge and insight—a partner in the ongoing definition of the organization as it evolves.

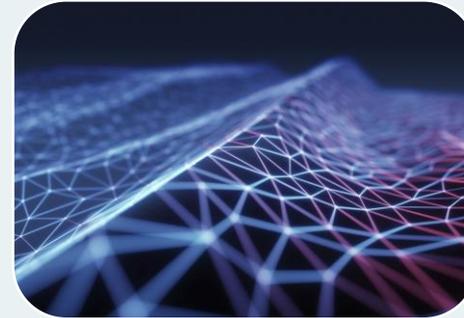
# AI and KM: Needs and Opportunities



Guardrail  
Management



LLM  
Discoverability



Context Model  
Management



Prompt  
Collaboration and  
Sharing



LLM Model  
Management &  
Retirement



New Knowledge or  
Lack Thereof



RAG and  
Knowledge Graph  
Management

# Guardrails



# The Impact of Unguarded Guardrails



- Guardrails are often (almost always) opaque to end users
  - Too cautious
  - Cause errors
  - Can censor information
- Guardrails can be easily bypassed
- External “mandates” implemented inconsistently across products
- Operationalizing guardrails can be complex.
- It can be difficult to keep up with legal and regulatory changes
- Fine-tuning can compromise safety.



# LLM Discoverability



# Hugging Face

The screenshot shows the Hugging Face website interface. At the top, there is a search bar and navigation links for Models, Datasets, Spaces, Posts, Docs, Enterprise, Pricing, Log In, and Sign Up. The main content area is divided into two columns. The left column contains a sidebar with various task categories: Multimodal (Audio-Text-to-Text, Image-Text-to-Text, Visual Question Answering, Document Question Answering, Video-Text-to-Text, Visual Document Retrieval, Any-to-Any), Computer Vision (Depth Estimation, Image Classification, Object Detection, Image Segmentation, Text-to-Image, Image-to-Text, Image-to-Image, Image-to-Video, Unconditional Image Generation, Video Classification, Text-to-Video, Zero-Shot Image Classification, Mask Generation, Zero-Shot Object Detection, Text-to-3D, Image-to-3D, Image Feature Extraction, Keypoint Detection), Natural Language Processing (Text Classification, Token Classification, Table Question Answering, Question Answering, Zero-Shot Classification, Translation, Summarization, Feature Extraction, Text Generation, Text2Text Generation, Fill-Mask, Sentence Similarity, Text Ranking), Audio (Text-to-Speech, Text-to-Audio, Automatic Speech Recognition, Audio-to-Audio, Audio Classification, Voice Activity Detection), and Tabular (Tabular Classification, Tabular Regression). The right column displays a list of models under the 'Models' tab, filtered by name. The models listed include: impira/layoutlm-document-qa, naver-clova-ix/donut-base-finetuned-docvqa, impira/layoutlm-invoices, jinhybr/OCR-DocVQA-Donut, faisalraza/layoutlm-invoices, eachadea/ggml-vicuna-13b-1.1, Xenova/donut-base-finetuned-docvqa, TusharGoel/LiLT-Document-QA, nikravan/glm-4vq, zpm/Llama-3.1-PersianQA, YuukiAsuna/VieTable-donut-docvqa-demo, frizwankhan/entity-linking-model-final, tiennvcs/layoutlmv2-base-uncased-finetuned-docvqa, tiennvcs/layoutlmv2-base-uncased-finetuned-infovqa, tiennvcs/layoutlmv2-base-uncased-finetuned-vi-infov..., tiennvcs/layoutlmv2-large-uncased-finetuned-infovqa, tiennvcs/layoutlmv2-large-uncased-finetuned-vi-info..., mishig/temp-model, xhyi/layoutlmv3\_docvqa\_t11c5000, pardeepSF/layoutlm-vqa, davanstrien/testwebhook, MariaK/layoutlmv2-base-uncased\_finetuned\_docvqa\_v2, rubentito/layoutlmv3-base-mpdocvqa, cloudqi/CQI\_Visual\_Question\_Awnser\_PT\_v0, hf-tiny-model-private/tiny-random-LayoutLMForQuesti..., and hf-tiny-model-private/tiny-random-LayoutLMv3ForQues...

naver-clova-ix/**donut-base-finetuned-docvqa**

like 224

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Document Question Answering



Transformers



PyTorch

vision-encoder-decoder

image-text-to-text

donut

image-to-text

vision

arxiv:2111.15664



License: mit

**Model card**

Files and versions



Community 21



Train



Deploy



Use this model

## Donut (base-sized model, fine-tuned on DocVQA)

Donut model fine-tuned on DocVQA. It was introduced in the paper [OCR-free Document Understanding Transformer](#) by Geewok et al. and first released in [this repository](#).

Disclaimer: The team releasing Donut did not write a model card for this model so this model card has been written by the Hugging Face team.

### Model description

Donut consists of a vision encoder (Swin Transformer) and a text decoder (BART). Given an image, the encoder first encodes the image into a tensor of embeddings (of shape batch\_size, seq\_len, hidden\_size), after which the decoder autoregressively generates text, conditioned on the encoding of the encoder.

Downloads last month

203,395



### Inference Providers NEW



HF Inference A

Document Question Answering

Examples

Drag image file here or click to browse from your device

Your sentence here...

Comput

View Code

Maxi

**Model tree for** naver-clova-ix/donut-base-finetuned-docvqa

# LM Discoverability



- Nonstandard metadata and model descriptions
- The models themselves can't be indexed
- Inconsistent naming conventions
- A vast number of models with varying capabilities
- Difficulty in assessing model quality without extensive testing and the potential for misleading or outdated information about model performance

# Context Model Management



# Context Model Management



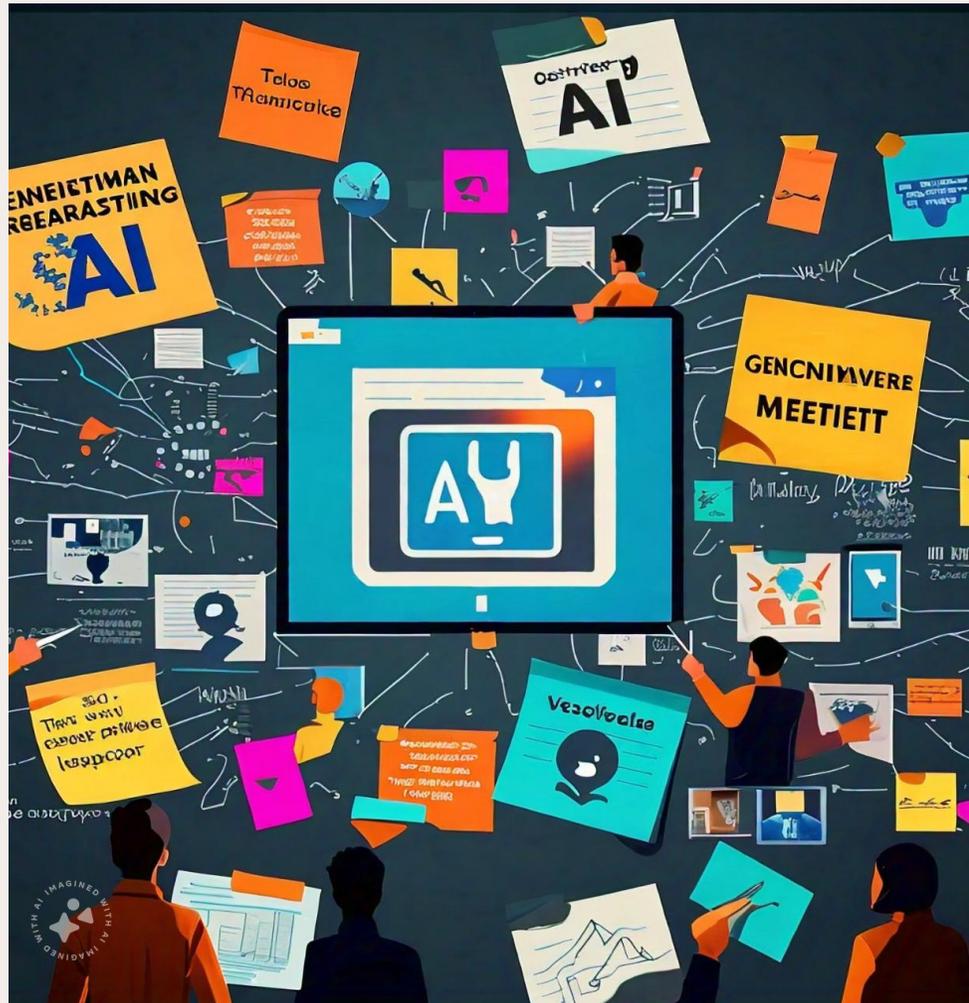
- Model Focus/Domains
- Configuration
- Depth
- Editorial Policies



# Prompt Collaboration and Sharing



# Prompt Collaboration and Sharing

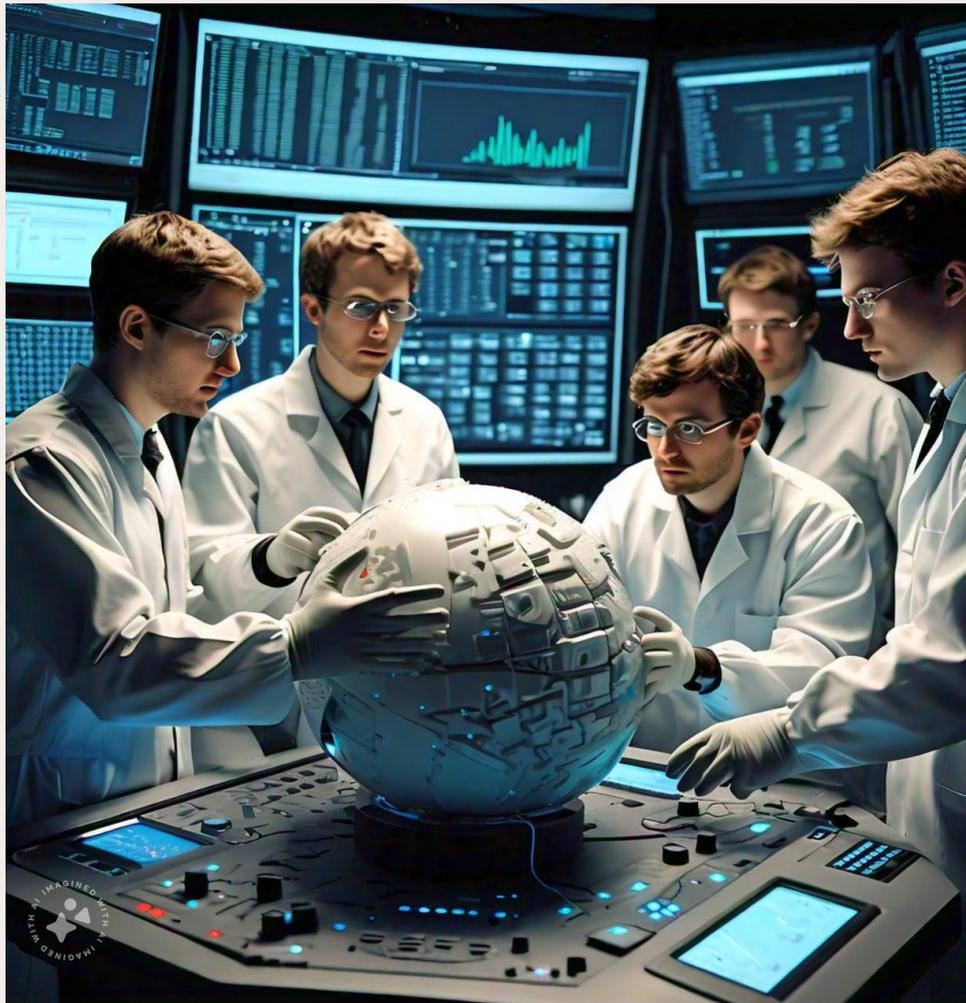


- Prompt sharing and reuse
- Prompt improvements
- Prompt variations by LLM

# LLM Model Management and Retirement



# LLM Model Management and Retirement



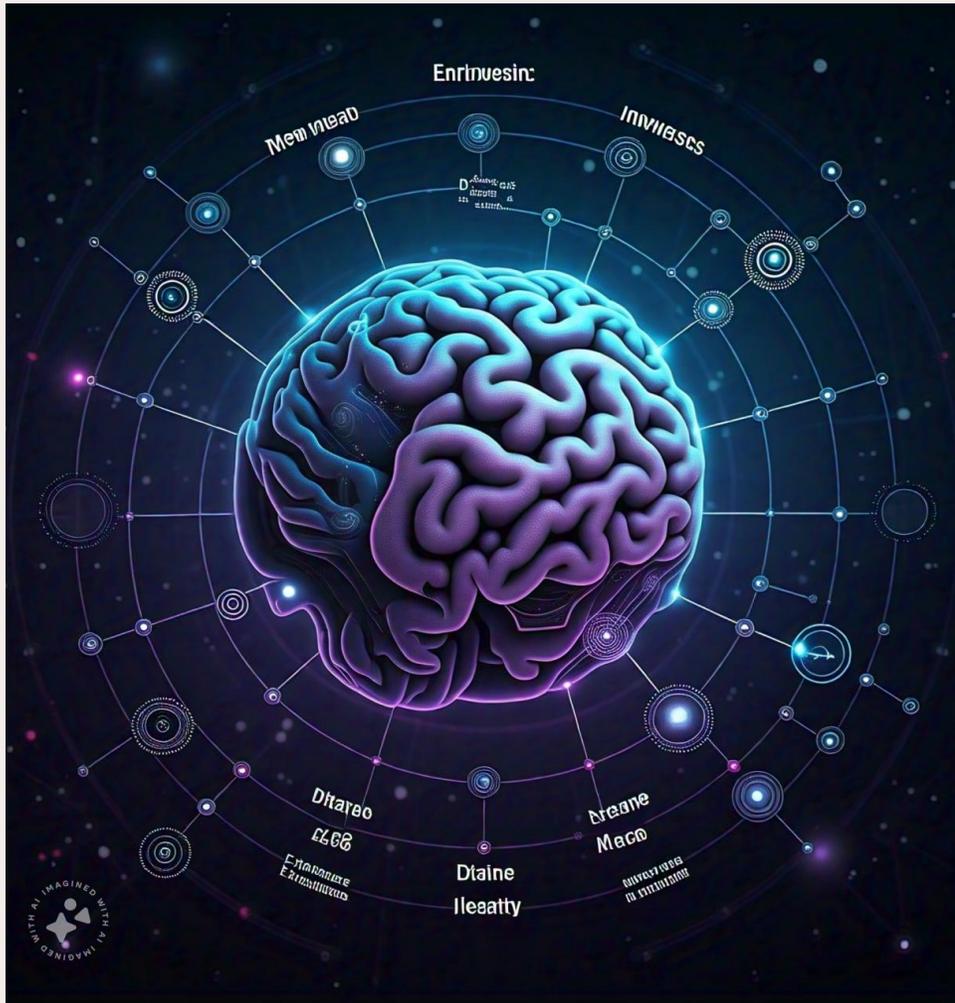
- Model Transparency: What model am I using? Which version of the model am I using?
- What is the “knowledge cutoff date” of my model?
- After the discontinuation date, will the new model require different interactions? Provide different answers?
- How do costs change with a new model?



# New Knowledge or Lack Thereof



# New Knowledge or Lack Thereof



- What does my model know?
- How does my model know it?
  - Knowledge Graph
  - RAG
  - API to Enterprise apps
  - Fine Tuning
  - Local Models
- How does my model incorporate new knowledge?

# RAG Configuration

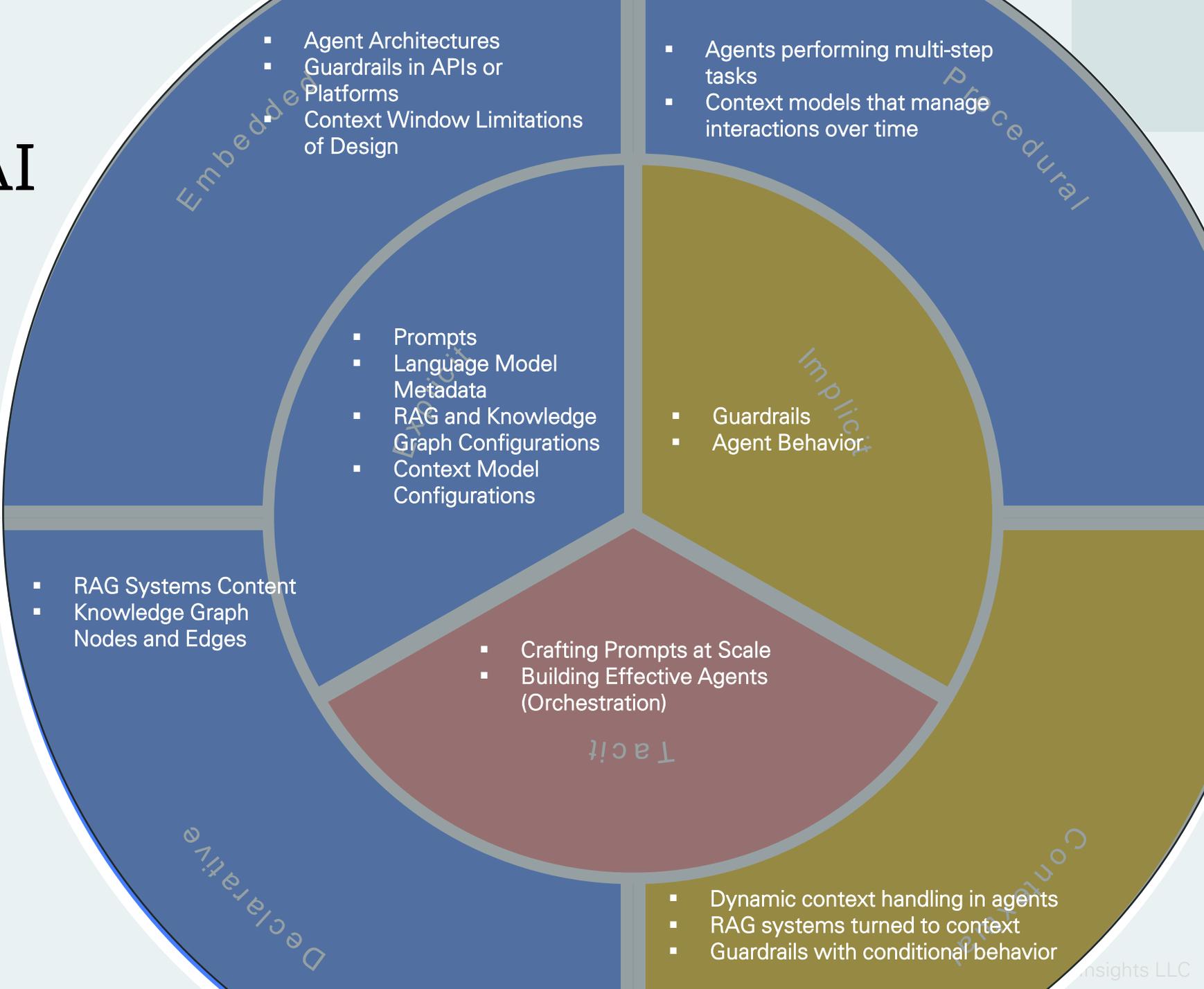


# RAG and Knowledge Graph Configurations

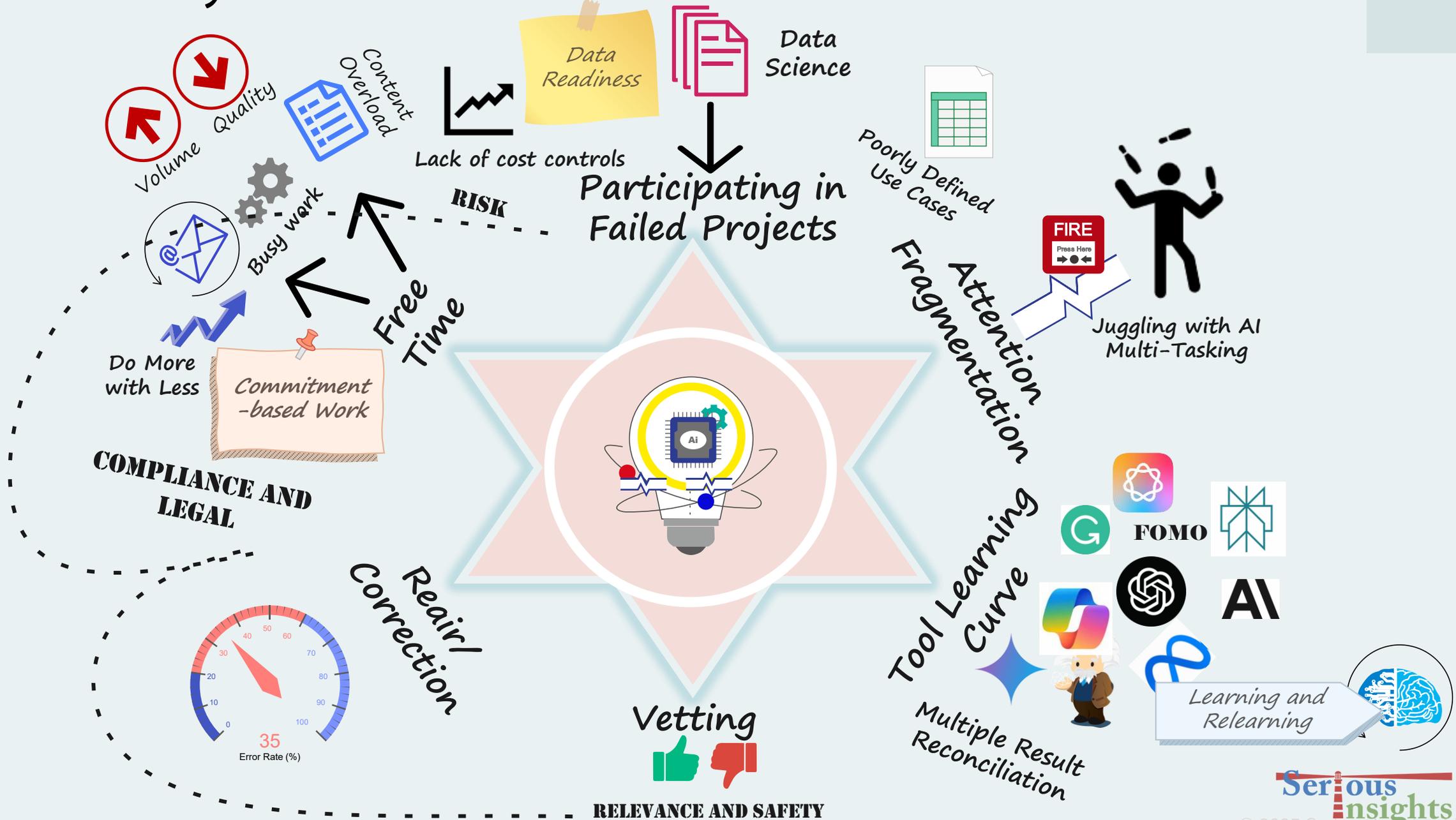


- Knowledge Graphs may not be transparent across the organization
- RAG sources may not be accurate or up to date
- Models may not be able to read source content such as complex graphics, images or slides
- RAG sources may be biased
- Licensing issues may make it hard or impossible to include certain content
- People don't know what's in the RAG implementations, so don't trust them completely

# The KM of AI



# The Ways AI Creates New Work and Wastes Time



## Exercise 2: Understanding Your Knowledge

### 30 min

- What classes of knowledge do you need to leverage?
- How is your knowledge different than that of competitors?
- How might that knowledge be applied better or more effectively to achieve organizational goals?
- Ask AI what it thinks

# Provide an outline, without commentary, of the classes of knowledge typically associated with retail.

## Product & Catalog Knowledge

- 1.1 Master data (SKU, UPC, variants)
- 1.2 Taxonomy & attributes
- 1.3 Digital assets (images, video, AR)
- 1.4 Compliance specs & certifications
- 1.5 Lifecycle (intro, refresh, end-of-life)

## Customer & Consent Knowledge

- 2.1 Profiles & identities (CIM/CDP)
- 2.2 Preferences & segments
- 2.3 Consent, purposes, and expirations
- 2.4 Journeys & behavioral signals

## Merchandising & Assortment Knowledge

- 3.1 Category strategies
- 3.2 Localization & clustering
- 3.3 Planograms & space management
- 3.4 Seasonal calendars & events

## Pricing & Promotion Knowledge

- 4.1 Base price, rules, elasticity
- 4.2 Offers, coupons, loyalty benefits
- 4.3 Markdown & clearance strategies
- 4.4 Competitive price intelligence

## Inventory & Availability Knowledge

- 5.1 ATS/ATP definitions
- 5.2 Replenishment & safety stock
- 5.3 RFID/scan accuracy practices
- 5.4 Substitutions & allocation rules

## Order & Fulfillment Knowledge

- 6.1 OMS orchestration rules
- 6.2 BOPIS/ship-from-store/curbside flows
- 6.3 Packing, shipping, carrier SLAs
- 6.4 Returns, exchanges, warranty handling

## Supplier & Product Lifecycle Knowledge

- 7.1 Vendor onboarding & data contracts
- 7.2 QA/QC specifications
- 7.3 Lead times, MOQs, compliance
- 7.4 Scorecards & performance metrics

## Store Operations Knowledge

- 8.1 Opening/closing SOPs
- 8.2 Cash, tills, and audit controls

## 8.3 Labor scheduling & tasking

## 8.4 Safety, incident, and LP procedures

## E-Commerce & Digital Experience Knowledge

- 9.1 PDP standards & completeness
- 9.2 Search, navigation, recommendations
- 9.3 Accessibility requirements
- 9.4 App/web release runbooks

## Marketing & Brand Knowledge

- 10.1 Brand guidelines & tone
- 10.2 Content calendars & assets
- 10.3 Channel playbooks (email, social, ads)
- 10.4 Attribution & lift models

## Customer Service Knowledge

- 11.1 Policy library & exceptions
- 11.2 Troubleshooting scripts & macros
- 11.3 Knowledge-centered support articles
- 11.4 Contact-reason taxonomy

## Financial & Performance Knowledge

- 12.1 P&L structures, COE, and allocations
- 12.2 KPIs & dashboards (GMROI, sell-through)
- 12.3 Store and channel scorecards
- 12.4 Budgeting & forecasting models

## Legal, Privacy & Compliance Knowledge

- 13.1 Data protection (GDPR/CPRA, minors)
- 13.2 Product safety & labeling
- 13.3 Payments & PCI
- 13.4 Records retention & e-discovery

## Risk, Security & Fraud Knowledge

- 14.1 Fraud patterns & rules
- 14.2 Loss prevention playbooks
- 14.3 Cyber & incident response
- 14.4 Business continuity plans

## Sustainability & ESG Knowledge

- 15.1 Sourcing standards & audits
- 15.2 Environmental attributes & claims
- 15.3 Packaging, waste, circular programs
- 15.4 Reporting frameworks & evidence

## Data, Analytics & Insight Knowledge

- 16.1 Metric definitions & lineage
- 16.2 Models, features, and evaluations
- 16.3 Experimentation & guardrails
- 16.4 Data quality rules & SLAs

## Technology & Architecture Knowledge

- 17.1 System maps & integrations
- 17.2 APIs, events, and schemas
- 17.3 Access controls & roles
- 17.4 Release, change, and incident runbooks

## Knowledge Governance & Content Operations

- 18.1 Taxonomy/ontology stewardship
- 18.2 Authoring, versioning, and review cycles
- 18.3 Source of truth designations
- 18.4 Archival & deprecation rules

## People, Training & Enablement Knowledge

- 19.1 Role curricula & micro-learning
- 19.2 Certification paths
- 19.3 Onboarding checklists
- 19.4 Coaching and best-practice libraries

## Real Estate & Facilities Knowledge

- 20.1 Lease terms & obligations
- 20.2 Maintenance schedules
- 20.3 Utilities & energy usage
- 20.4 Store layout blueprints

## International & Localization Knowledge

- 21.1 Currency, tax, and duties
- 21.2 Language & cultural adaptations
- 21.3 Local regulations & holidays
- 21.4 Cross-border logistics rules

## Marketplace & Third-Party Channel Knowledge

- 22.1 Onboarding & SLAs
- 22.2 Content and price parity rules
- 22.3 Dispute & chargeback processes
- 22.4 Data sharing and reporting standards

# Obstacles For Retail

- **A single semantic layer.** A governed ontology for products, customers (with consent), locations, orders, and content—exposed as a “data product” for analytics, apps, and AI.
- **Associate copilots.** Retrieval-augmented assistants tuned on current policies, planograms, promos, and troubleshooting—surfacing store-specific answers on handhelds.
- **Return-intelligence loop.** Mine return reasons, fit feedback, and service transcripts to fix PDP content, sizing charts, and supplier quality—measured by return-rate lift.
- **Unified product storytelling.** One source of truth for attributes and media that renders consistently to PDPs, kiosks, chat, ads, and store signage.
- **Consent-aware personalization.** A clean customer graph with explicit purposes and expirations; recommendations and outreach adapt to what’s allowed, not just what’s possible.
- **Real-time inventory signals.** Event streams from POS, RFID, and WMS keep ATP/ATS honest; better BOPIS promises, fewer cancellations.
- **Supplier data contracts.** Schematized, testable contracts for specs, packaging, ESG, and lead times; automated validation and scorecards improve negotiations and forecasting.
- **Knowledge-led merchandising.** Blend qualitative associate notes with demand and web behavior to localize assortments, promos, and space—documented decisions, repeatable playbooks.
- **Training as a living product.** Micro-lessons tied to tasks and seasonality; analytics show time-to-competence and reduce escalations.
- **Content lifecycle discipline.** Author-once, reuse-many: versioned policies and answers with expiry, ownership, and review SLAs; channel-specific presentations generated, not copy-pasted.
- **Model governance that sticks.** Dataset lineage, eval sets tied to business KPIs (accuracy on size/fit, policy answers), human-in-the-loop thresholds, incident playbooks.
- **Store-digital symmetry.** Make store knowledge addressable: planograms, fixtures, local events. Digital teams can target by aisle, not just by demographic.

# Mapping Obstacles To Outcomes

Opportunity	Obstacles Addressed	How it helps (one line)
A single semantic layer	Fragmented data estate; Governance drag; AI without guardrails; Content sprawl; Identity fog; Supplier blind spots; Measurement myopia	Creates shared definitions and APIs so every system, dashboard, and model pulls from the same governed truth.
Associate copilots	Tacit knowledge loss; Content sprawl; AI without guardrails; Inventory ambiguity	Surfaces current policies, playbooks, and store specifics via retrieval, reducing guesswork on the floor.
Return-intelligence loop	Shaky product truth; Supplier blind spots; Content sprawl; Measurement myopia	Feeds return reasons into PDP fixes and vendor scorecards; tracks “returns avoided” as a core KPI.
Unified product storytelling	Shaky product truth; Content sprawl; Governance drag	One PIM/DAM pipeline renders consistent attributes and media to all channels.
Consent-aware personalization	Identity fog; Privacy & policy risk; Governance drag	Resolves identities with purpose/expiry tags so outreach and recs are lawful and auditable.
Real-time inventory signals	Inventory ambiguity; Fragmented data estate; Measurement myopia	Streams RFID/POS/WMS events to keep ATP/ATS accurate for promises and planning.
Supplier data contracts	Supplier blind spots; Shaky product truth; Governance drag; Fragmented data estate	Standardizes inbound specs, ESG, and lead times with automated validation and scorecards.
Knowledge-led merchandising	Tacit knowledge loss; Measurement myopia; Fragmented data estate	Blends associate notes with demand and web behavior to localize assortments and justify decisions.
Training as a living product	Tacit knowledge loss; Content sprawl; Measurement myopia	Task-tied micro-lessons reduce escalations and show time-to-competence.
Content lifecycle discipline	Content sprawl; Governance drag; AI without guardrails; Shaky product truth	Versioned, owned content with expiry and review SLAs improves retrieval and channel reuse.
Model governance that sticks	AI without guardrails; Privacy & policy risk; Measurement myopia; Governance drag	Links datasets to lineage and evaluation tied to business KPIs; defines incident playbooks.
Store-digital symmetry	Tacit knowledge loss; Fragmented data estate; Content sprawl; Inventory ambiguity	Makes planograms, fixtures, and local context addressable so digital and store ops act in concert.

# AI in Libraries

## Personalized Recommendations

AI can recommend relevant resources to users based on their browsing history, interests, and preferences.

## Virtual Assistants

Chatbots and virtual assistants can answer user queries, provide directions, and guide users through the library's resources.

## Robotics

Libraries can use robots to perform tasks like shelving, stocktaking, and answering user queries.

## Interactive Exhibits

AI can power interactive exhibits that respond to user curiosity and guide them on journeys of exploration.

## Automated Tasks

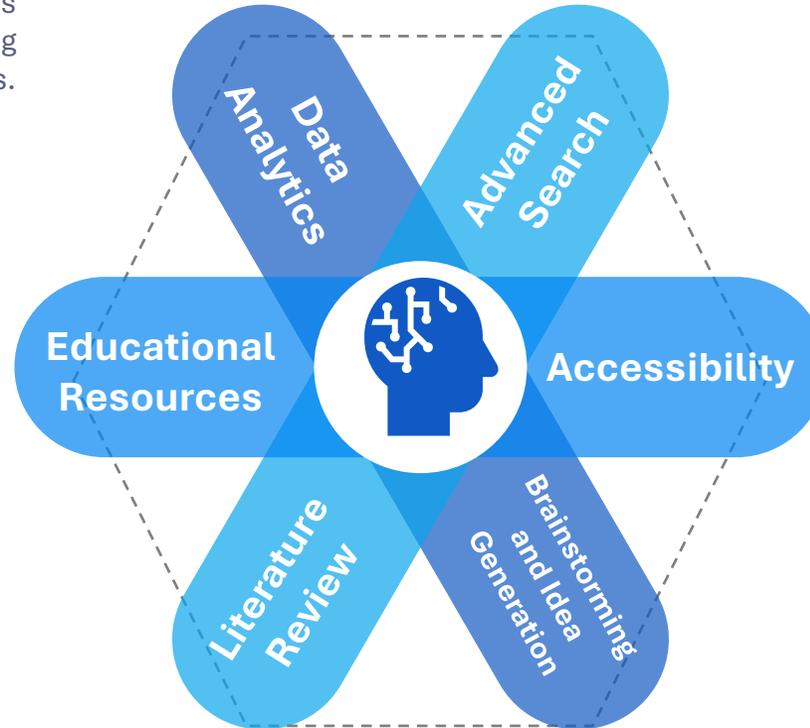
AI can automate repetitive tasks like metadata management, cataloging, and even shelving and stocktaking.

## Streamlined Processes

AI can streamline processes like interlibrary loan requests, hold and reservation management, and user account management.

## Digital Preservation

AI can assist in digitizing and preserving historical and rare materials, ensuring their longevity and accessibility.



# Exercise 3: KM Strategy Development

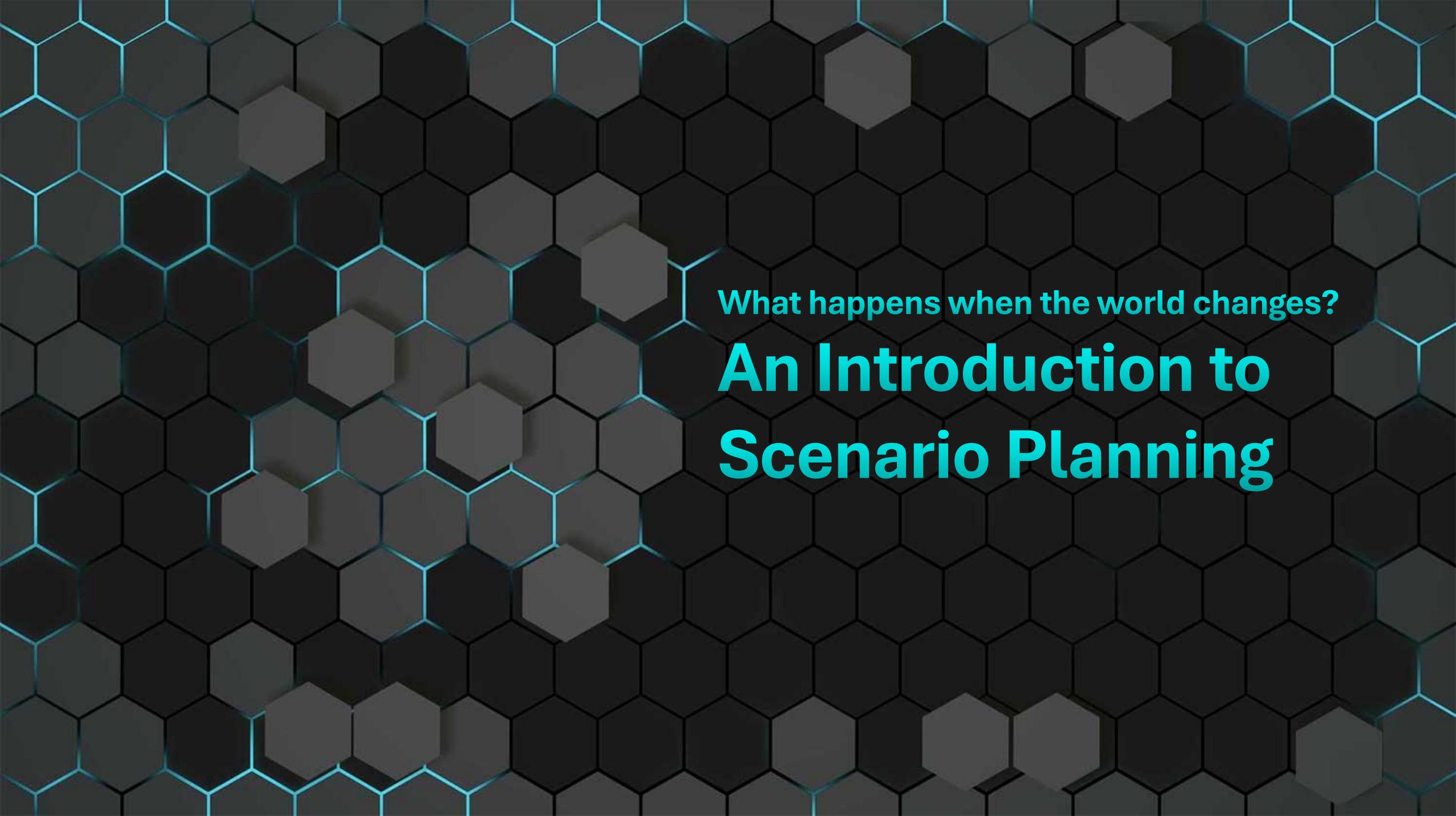
## 40 min

- Use AI to explore approaches to knowledge management for your industry and set of challenges.
- Use AIs collaboratively and iteratively.

# Exercise 4: Prompt & RAG Lifecycle

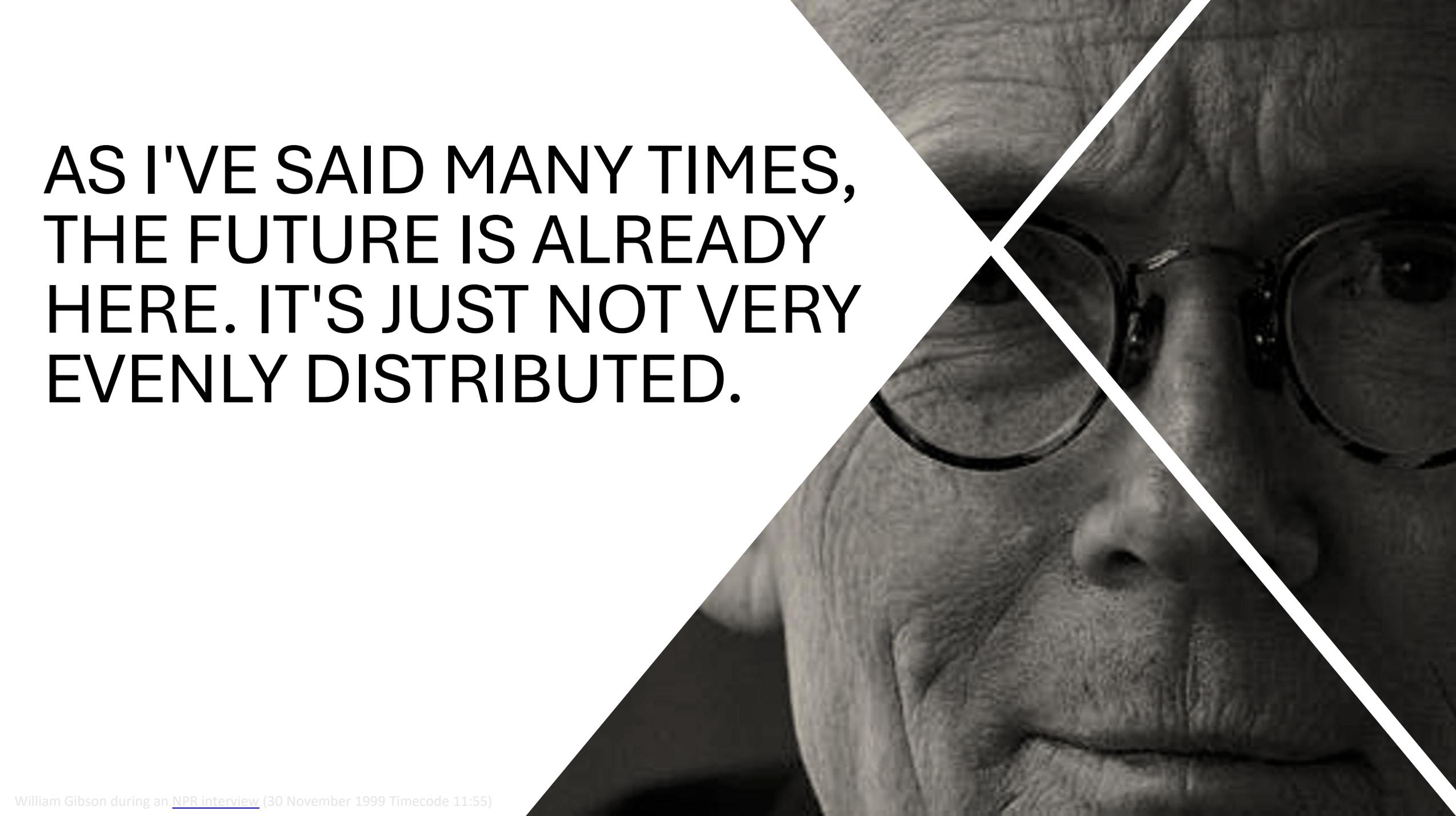
## 40 min

- Build a KM-aligned prompt and retrieval approach.
- Define creation, validation, and retirement cycles.

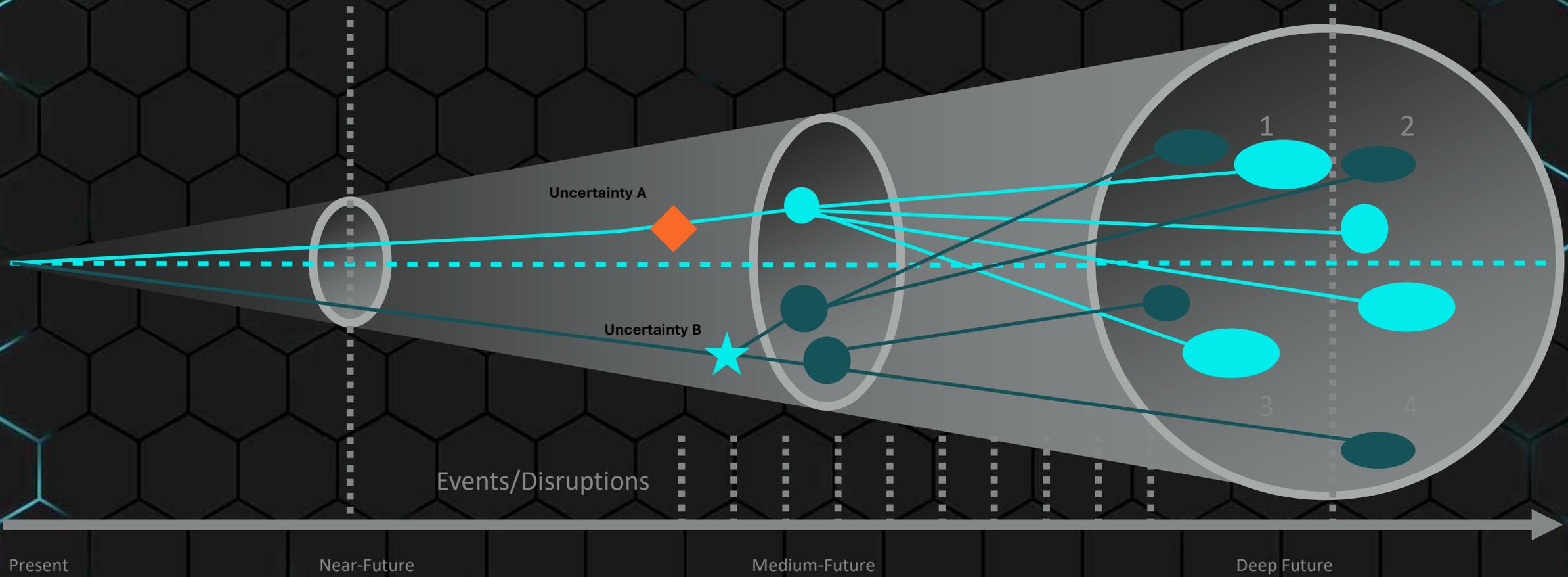


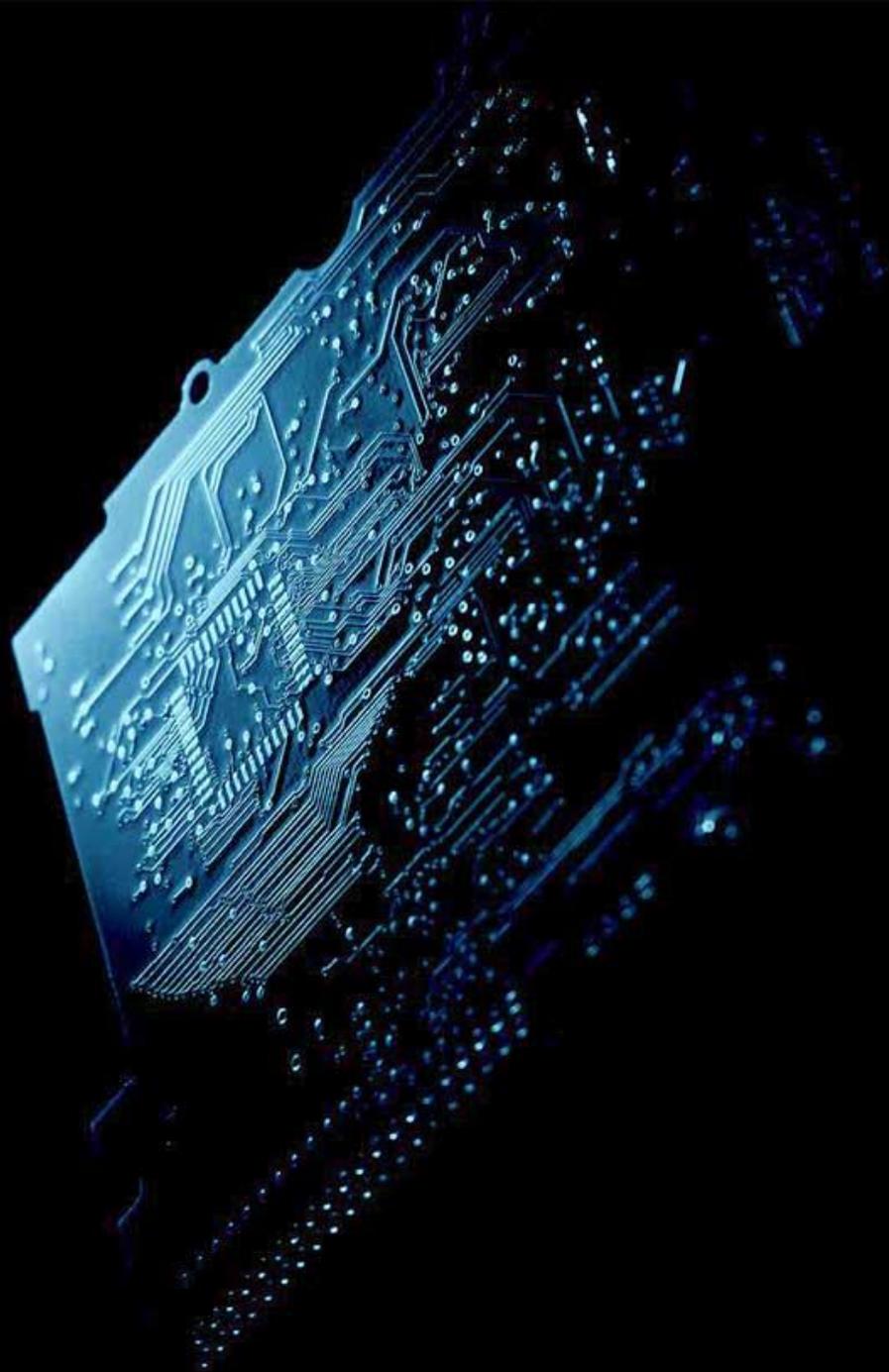
What happens when the world changes?

# **An Introduction to Scenario Planning**



AS I'VE SAID MANY TIMES,  
THE FUTURE IS ALREADY  
HERE. IT'S JUST NOT VERY  
EVENLY DISTRIBUTED.





Describe the focal issue

What will banking look like in 2030?

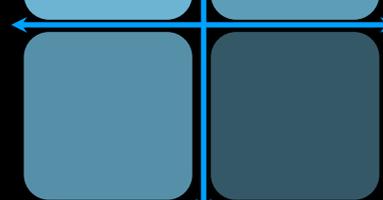


Identify the context, uncertainties, driving force and factors of influence



Prioritize and select critical uncertainties to drive the matrix

Define the matrix. Develop the scenario stories.



Create an early warning system



Observe, interpret and adjust



Define early indicators



Identify implications, actions and contingencies

# SCENARIO PLANNING

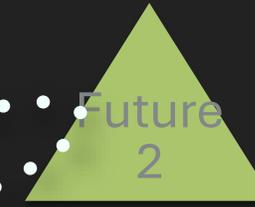
TEST IDEAS, CONCEPTS AND STRATEGIES AGAINST VARIOUS PLAUSIBLE FUTURES IN ORDER TO UNDERSTAND HOW ROBUST THEY ARE IN THE FACE OF CHANGE.

WHAT WE WANT TO BE TOMORROW...

VISION OR FUTURE STATE

Practice agility

Identify emergent opportunities



Avoid surprises

Understand implications for different possible future on strategies, goals and objectives



Test and challenge prevailing assumptions

UNCERTAINTY

Create an early warning system

SWOT

WHO ARE WE & WHAT WE DO TODAY



STRATEGY

# Reimagining SWOT



## Strengths

Public sector organizations often have a strong commitment to societal impact, equity, and long-term policy goals



## Weaknesses

Innovation in the public sector can be slow due to high risk aversion and the need for consensus



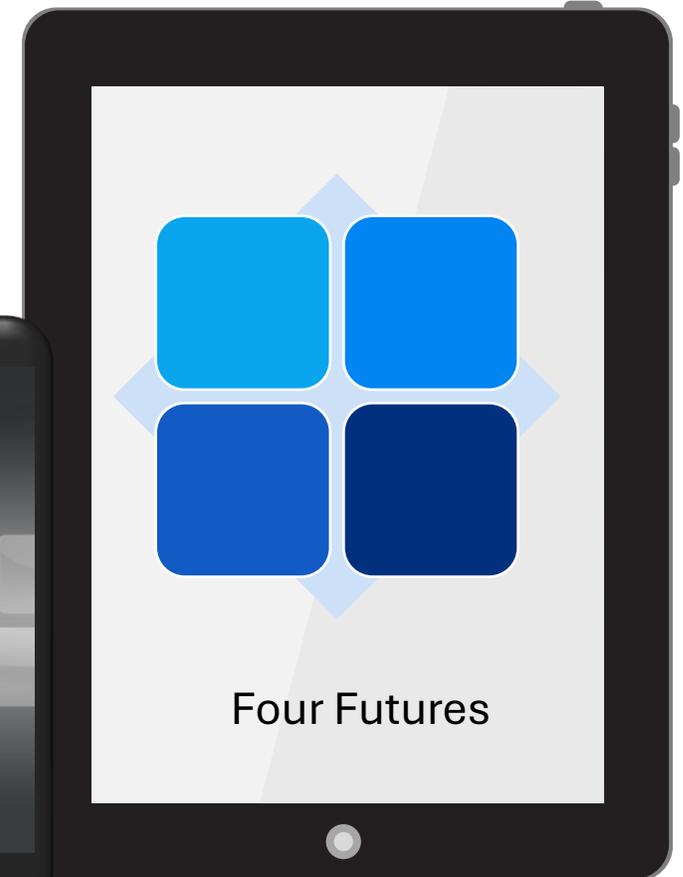
## Opportunities

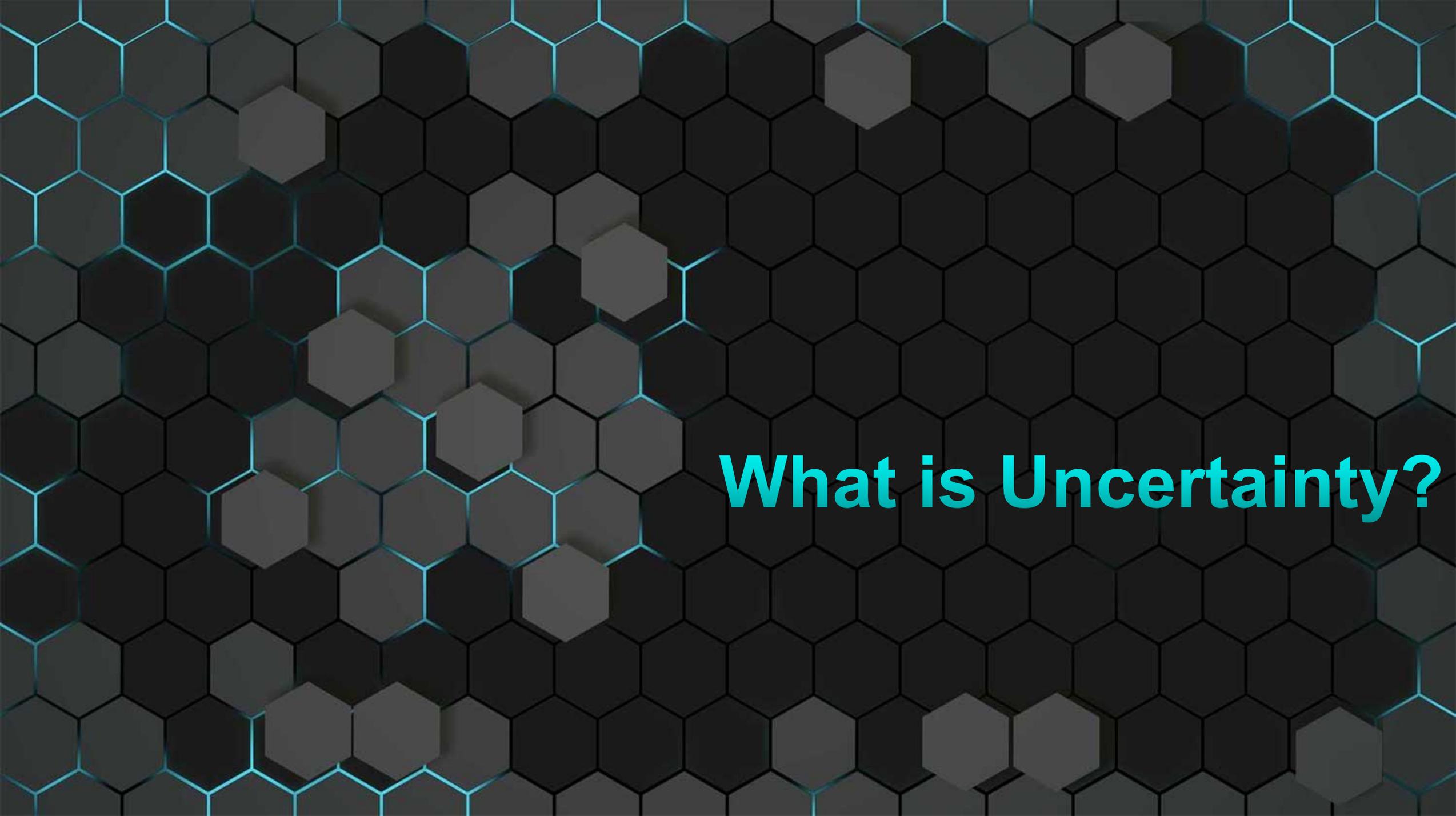
There are opportunities to leverage emerging technologies to enhance strategic planning and execution



## Threats

Public sector organizations face challenges such as funding cuts, political scrutiny, and the rise of misinformation





**What is Uncertainty?**

# STEEP

S ocial

T echnological

E conomic

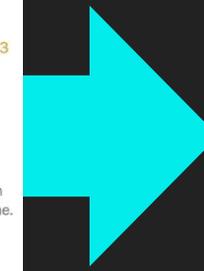
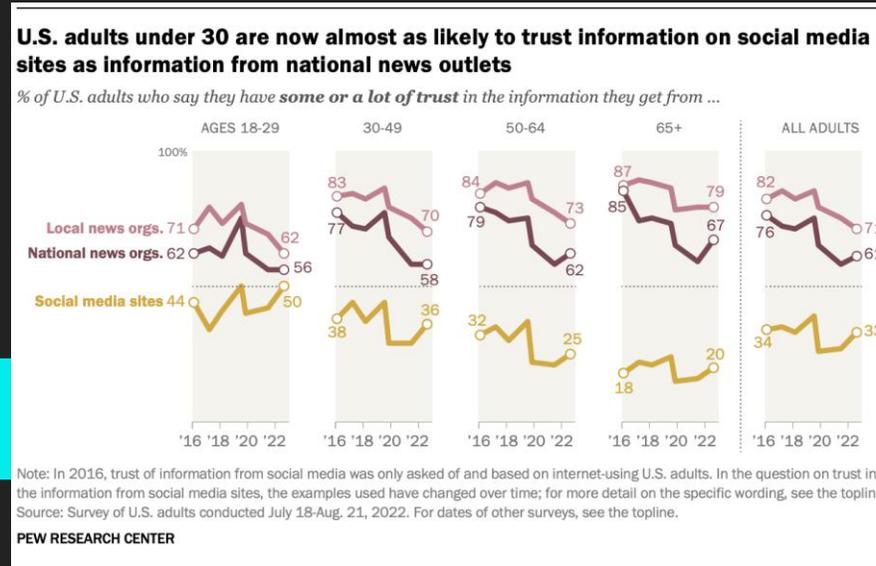
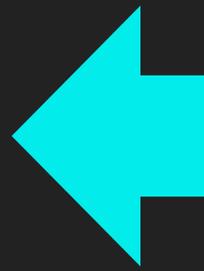
E nvironmental

p olitical



# TRUST IN INFORMATION

Misinformation grows, often purposefully



Misinformation wanes though some pockets skirt fact-checking

**More people are avoiding the news, and trusting it less, report says**

<https://www.reuters.com/business/media-telecom/more-people-are-avoiding-news-trusting-it-less-report-says-2022-06-14/>

**Americans' Trust In Media Remains Near Record Low**

<https://news.gallup.com/poll/403166/americans-trust-media-remains-near-record-low.aspx>

**U.S. adults under 30 now trust information from social media almost as much as from national news outlet**

<https://www.pewresearch.org/short-reads/2022/10/27/u-s-adults-under-30-now-trust-information-from-social-media-almost-as-much-as-from-national-news-outlets/>

**American Views 2022: Part 2, Trust Media and Democracy**

<https://knightfoundation.org/reports/american-views-2023-part-2/>

# CONTENT CENSORSHIP

*March 2021: At the end of February, Amazon removed When Harry Became Sally: Responding to the Transgender Movement from its main web store, its Kindle servers and its audiobook line-up with no explanation. Speaking to Just the News, the book's author Ryan Anderson said that he'd received no communication from Amazon about the ban. When the news organisation reached out to Amazon, they were directed to a page outlining their 'Content Guideline for Books', with a focus on the section labelled 'Offensive Content'.*

Rare & Transparent  
or Prohibited

*Although censorship violates the First Amendment right to freedom of speech, some limitations are constitutionally permissible. The courts have told public officials at all levels that they may take community standards into account when deciding whether materials are obscene or pornographic and thus **subject to censor.***

<https://www.mtsu.edu/first-amendment/article/986/book-banning#:~:text=Although censorship violates the First, and thus subject to censor.>



*Changes to new editions of Roald Dahl books have readers up in arms*

<https://www.npr.org/2023/02/21/1158347261/roald-dahl-books-changed-offensive-words>

Regular and  
Expected

*Why Amazon's new book policy should worry us all*

<https://theboar.org/2021/03/why-amazons-new-book-policy-should-worry-us-all/>

# Libraries Critical Uncertainty

## 03 Scenario Planning Tour: Future of Library Uncertainties

### 04 Scenario Planning: Real Examples

#### Library relationship to publishers

Behind E-Books, ...  
power-library-co...  
Collective  
Independent-isol...  
The Power of Lib...  
Measureme...

#### Recognition of non-traditional learning

2 Reasons Why A Certificate ...  
How Important Is a College ...  
As good as traditional learni...  
Complementary--Suppleme...

#### Value of curated content

Content Curation: A New Pr...  
How artificial intelligence mi...  
Flat World ...  
Probably sure there is already e...  
Resurgent and engaging

#### Predominant source of energy

BP Getting to Net Zero  
McKisney: Global Energy Per...  
Fossil Fuels Dominate Energy...  
Scalable renewable energy

#### Content control

Authors-publi...  
State-publi...  
American history textbooks ...  
Evolution Education in the U...

#### Copyright Law

Favors authors  
Favors publishers...  
Copyright's Asy...  
Generative AI Ha...  
TECHNOLOGY A...  
The EU copyright...

#### Funding for libraries

Decreasing fundi...  
Increasing fundin...  
Impact of L...  
library-fundin...  
The book battle i...  
Why Republicans...

#### What drives political decision-making

Facts-Evidence In...  
Ideology Informs...  
how-to-make-dec...  
Ideologues witho...  
The Case for Evid...

#### Access to information for work and life

Access to inform...  
Access to inform...  
Disinformation...  
Infodemic: The R...  
More Data, Great...  
Optimal collecti...

#### Content Censorship

Rare & Transpare...  
Regular and Expe...  
Flat World ...  
Book Banning  
New editions of ...  
Post-pandemic c...  
Why Amazon's n...

#### Fairness and equity, inclusiveness, social equal...

Discrimination b...  
Work experience...  
Antisemitic inci...  
Diversity and incl...  
Kellogg's 'woke' ...  
Mapping Attacks...

#### Homelessness

Decreasing inner-city homel...  
Homeless is constant to rising  
Flat World ...  
How Bakersfield, California E...  
The homelessness populatio...

#### How Adults Learn

Formal learning ...  
Multi-modal and...  
Key Facts about ...  
More workers wit...  
The Transformati...

#### How long people pay attention

More distracted  
More focused  
Acceptance...  
changing-atteni...  
Five Powerful Wa...  
The Human Atte...

#### Illicit drug use in inner cities

Drug use continues to be a ...  
Drug use remains an issue b...  
Book Banni...  
One Year Inside a Radical Ne...  
Poverty, homelessness, and ...

#### Impact of Culture Wars

Continued divisi...  
Healing, reconcili...  
America's 'cultu...  
How the 'Culture...  
The Culture Wars...

#### Library Science as a Discipline

Library science re...  
Library science re...  
2023 Library Scienc...  
a-new-profile-for...  
Library and Infor...

#### Loneliness

Loneliness is a major social i...  
Society finds ways to proacti...  
Loneliness-subside...  
Our Epidemic of Loneliness ...

#### The civility of civil discourse

Polarization, misi...  
Respectful comm...  
snowflake-and...  
An American Ret...  
Getting back to c...

#### The Propensity for Sensemaking

People accept the world ofte...  
People seek to make sense o...  
Sense-Making - An Essential...  
Sensemaking in the Time of ...

#### The role of libraries

Learning spaces...  
Social spaces wit...  
Houston School...  
I Am Being Push...  
The Future of Lib...  
Public Libraries D...

#### Trends in Reading

Less reading: biased informa...  
More reading: positive enga...  
Social Cohe...  
Americans Read Nearly 25% ...  
Who doesn't read books in ...

#### Trust in Government

Fragmentation-R...  
Negotiation-Co...  
Flat World ...  
Americans' Views...  
The Threat of Civ...  
Trust in Governm...

#### Trust in Information

Misinformation g...  
Misinformation ...  
Americans' Tru...  
More people are ...  
Part 2 Trust, Medi...  
Younger adults tr...

#### Access to necessary and emerging technology

Equitable access ...  
Lack of access or ...  
Flat World ...  
Closing the Digit...  
Closing the Digit...  
major-federal-fu...  
san-jose-closing-...

#### Adoption of Spatial Computing Experiences

Overlay This and ...  
Spatial Computin...  
Flat World ...  
How Big D...  
10 Virtual Reality ...  
More potential n...  
spatial-computin...

#### Impact of Analytics

Informing and e...  
Insightful but ov...  
Flat World ...  
4 Types of Data...  
Algorithms are M...  
Data-Driven Libr...  
artificial intellige...

#### Pace of AI diffusion

Rapid expa...  
Steady but ...  
NYC's anti-...  
AI Right Path...  
AI-Generat...  
Is the Chat...  
Sarah Silver...

#### Preservation of content in a digital world

Rapid chan...  
Technology...  
Adobe and ...  
Comparativ...  
Libraries an...  
Recommen...  
The Interne...  
the-lifesp...

#### The approach to metadata

Full indexing and pattern rec...  
Metadata remains an import...  
Breadth of ...  
Does AI Make Photo Metada...  
We were promised Strong AI...

#### The Role of AI

The future of job...  
Co-pilot  
Overlord  
AI is Everywhere. ...  
Generative AI A...  
Successful gener...

# Rethink Your Strategy



Strategy is the story your organization tells itself about its ambitions and its future. If your strategic plan doesn't align with your story, you will likely underachieve on your strategic objectives, perhaps even failing to articulate them in the plan.

# Next Steps





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[serioustees.com](http://serioustees.com)



תודה

Merci

謝謝

Kiitos

ευχαριστώ

Dank u

Tack

谢谢

Thank you

Gracias

Takk

Спасибо

Asante

감사합니다

Obrigado

ありがとう

Tak

Mulțumesc

شكراً:

dhanayawad

Grazie

Danke