



Business Learning Institute

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Session 1:

Personal Knowledge Management: Leveraging PKM for Career Growth

Don Tomoff

Business Learning Institute Provider

PRESENTED TO

North Carolina Association of CPAs

In-person (Asheville, NC)

September 9, 2024



Donald Tomoff, CPA, MBA

Don is the founder of Invenio Advisors LLC, a consulting firm specializing in information management, process improvement, reporting and data analysis, as well as education and training. Don's experience includes "Big 4" public accounting, senior-level industry finance positions, and consulting. Don's industry experience includes serving eight years with Jo-Ann Stores as VP, Finance and Treasurer.

Since 2010, Don has focused his efforts with executives and companies on many digital process improvement, data analytics and training initiatives, including developing and implementing mobile information strategies. His efforts are focused on the identification of process improvement opportunities, and leveraging readily available technology tools to drive that change. In addition to consulting, Don speaks at various conferences, including the IMA National Conference in Indianapolis, IN.



ADDITIONAL MATERIALS FOR YOUR STAFF

Pam Devine, Customized Learning Manager
800-782-2036, ext. 321 | pam@aicpa-cima.org

Automation In Excel: Using Macros Without Understanding Code (VBA)

CPA Firm Business Development: Don't Miss The Data Analytics Opportunity

Custom Excel Training: Basic to Beginner Advanced

Excel – Young Professionals: Skills to Jump Start Your Career

Excel Data Management: Tables and Pivot Tables Challenge

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 1 – Excel Basics and Best Practices

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 2 – Formulas and Functions: Best Practices and Top Functions To Understand

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 3 – Data Management & Introduction to Power Query

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 4 – Data Analysis, Pivot Tables and Power Pivot

Excel Productivity: 5 Excel Tips and Techniques to Massively Boost Team Productivity

Excel, Power BI and Data Analysis – Eliminating the Paralysis of the Analysis

Excel, Power BI and Data Analysis – Eliminating the Paralysis of the Analysis

Excel, Power Tools, and PowerBI: Upping Your Data Analytics Game

Excel: 5 Reports Your CFO Wants (But Probably Doesn't Have) – Developing an Anticipatory Mindset

Excel: 5 Tips for Understanding a Complicated Spreadsheet

Introduction to Data Analytics with Power Pivot

Introduction to Microsoft OneNote

Introduction to Data Analytics with Power Query (Get and Transform in Excel 2016)

Stand Out with Your Excel Skills: Key Capabilities to Set You Apart

Tech Trends for Accountants: What To Know and What You Can Do About It

The Big 5: Excel and PowerBI Data Topics

The Essentials of Data Analytics: Excel & PowerBI

Welcome To The Future: Forget "Excel" – Understand Today's Excel

Personal Knowledge Management:

Leveraging PKM for Career Growth & Innovation

Business & Industry Fall Conference
Donald Tomoff, CPA, MBA
September 9, 2024



[Source: alamy.com](https://www.alamy.com)

“Your net productivity is the balance of the productive and unproductive forces in your life.

A great deal of time and energy is spent thinking about how to increase effort, but there is a lot to be gained by reducing friction.

A car will travel faster not only if you press the accelerator, but also if you remove the speed bumps.”

– James Clear

Learning Objectives

1. Recall the key concepts and principles of personal knowledge management (“PKM”) and how they apply to business and your career.
2. Recognize why a PKM system is essential for career growth and innovation.
3. Determine a strategy for implementing and leveraging technologies for a PKM system.
4. Select various tools to start your PKM process.

*“The more that
you read, the
more things
you will know.
The more that
you learn, the
more places
you’ll go.”*

- Dr. Seuss



Agenda

Introduction

What Is PKM?

Key Concepts

Frameworks

Tool Recommendations

Case Studies – Demos

Wrap Up

Introduction

My goal today...

1. **Simplify** the topic of PKM.
2. Relate this to **YOU**. Your World. Your Workflow.
3. Provide a broad view of **technologies**.
4. Understand it IS NOT the technology – it's the **process**.
5. Arm you with **frameworks** and resources to move forward.
6. Your **mindset** is everything!

*“Simplicity is
the ultimate
sophistication”*

*- Leonardo da
Vinci*



My goal today...

1. **Simplify**
2. **YOU**
3. **technologies**
4. **process**
5. **frameworks**
6. **mindset**

*“Simplicity is
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The longest
journey begins
with one
small step.

ACHIEVEMENT

PassItOn.com

THE FOUNDATION FOR A BETTER LIFE

Let's Time Travel...

2000

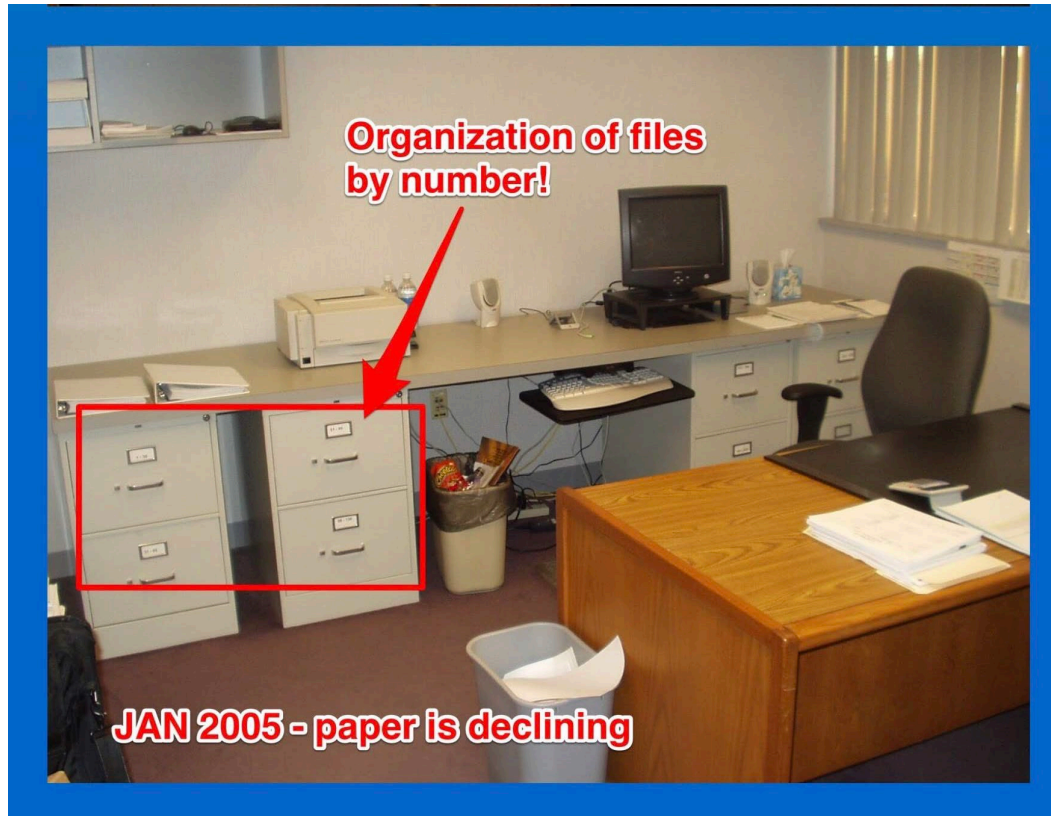


*"Innovation
requires an
experimental
mindset."*

*- Denise
Morrison*

Let's Time Travel...

2005



“Innovation requires an experimental mindset.”

- Denise Morrison



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What Is PKM?

Personal Knowledge Management (“PKM”)

1. “**Personal knowledge management (PKM)** is a collection of processes ***that a person uses to gather, classify, store, search, retrieve and share knowledge*** in their daily activities ([Grundspenkis 2007](#)) and the way in which these processes support work activities ([Wright 2005](#)).
2. It is a response to the idea that ***knowledge workers need to be responsible for their own growth and learning*** ([Smedley 2009](#)).

https://en.wikipedia.org/wiki/Personal_knowledge_management



PKM For Career Growth

PKM involves systematically organizing and utilizing knowledge to enhance productivity, continuously develop skills, and achieve professional goals.

1. **Productivity** – streamline workflows, reduce effort searching
2. **Skill development & Learning** – tracking/progress to new skills, maintain repository of resources
3. **Professional networking**
4. **Goal setting and Achievement**



PKM For Innovation

PKM fosters creativity and collaboration by efficiently capturing, sharing, and applying insights, enabling individuals and teams to stay ahead of trends and drive new ideas.

1. **Creativity & Idea Generation** – capture ideas and brainstorming
2. **Facilitate Knowledge Sharing** – share insights, build collaborative environment
3. **Monitor Trends & Research** – curate a knowledge base
4. **Robust Search & Retrieval** – instant retrieval of critical information



Key Ideas

1. **Productivity and Efficiency:** PKM helps individuals systematically organize and access their knowledge, reducing time spent searching for information and enabling more efficient decision-making and task completion.
2. **Learning and Growth:** By effectively managing knowledge, PKM fosters continuous learning and skill development, ensuring that individuals stay up-to-date with industry trends and can adapt to new challenges.
3. **Innovation and Creativity:** A well-structured PKM system encourages the capture and sharing of insights, promoting collaboration and the generation of new ideas, which are essential for innovation in both personal and professional contexts.

“In today's information-driven world, the ability to manage knowledge effectively is what separates successful individuals and organizations from the rest.”
- Thomas Davenport





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Key Concepts

Key Concepts to Developing a PKM System

1. Awareness
2. Security
3. Digital
4. Accessibility (Mobile)
5. Cloud
6. Automation
7. Gen AI
8. Search

"Effective Personal Knowledge Management is the key to unlocking your potential and staying ahead in an information-driven world."



1 - Awareness

Awareness is about creating a process to stay informed and understand what is happening around you, ensuring that the knowledge and information you accumulate are relevant and aligned with your goals and tasks.

[Let's analyze this with ChatGPT](#)



2 - Security

Security ensures that your personal knowledge assets are protected from unauthorized access, breaches, and potential data loss, while also including a robust password management process for quick and secure access to your information.

[Let's analyze this with ChatGPT](#)



3 - Digital

Digital emphasizes the integration and utilization of digital tools and platforms to manage, store, and retrieve knowledge efficiently. This approach fosters a paperless environment, leveraging technology to enhance the organization, accessibility, and sharing of information.

[Let's analyze this with ChatGPT](#)



4 - Accessibility (Mobile)

Accessibility, particularly on mobile, emphasizes the importance of having seamless access to your knowledge and information across devices, anytime and anywhere.

[Let's analyze this with ChatGPT](#)



5 - Cloud

Cloud-based PKM leverages online storage and services to manage, sync, and access knowledge and information across multiple platforms and devices.

[Let's analyze this with ChatGPT](#)



6 - Automation

Automation in PKM refers to using tools and processes to streamline the collection, organization, retrieval, and sharing of knowledge, reducing manual effort and increasing efficiency.

[Let's analyze this with ChatGPT](#)



7 - Generative AI

Gen AI in PKM incorporates generative artificial intelligence to enhance the discovery, creation, and management of knowledge, offering advanced insights and automated assistance.

[Let's analyze this with ChatGPT](#)



8 – Search

Search pertains to the capability to quickly and effectively locate specific knowledge and information within your personal knowledge repository using advanced search tools and techniques.

[Let's analyze this with ChatGPT](#)





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Frameworks

Concept of “Second Brain”?

Created by Tiago Forte ([website](#))

“A “Second Brain” is a personal knowledge management system designed to help individuals capture, organize, and retrieve information efficiently. The goal is to create a digital repository where you can store valuable knowledge outside of your mind, allowing you to focus on creativity, problem-solving, and decision-making without the cognitive overload of remembering everything.”

[ChatGPT Thread](#)



Framework #1 – “CODE”

Created by Tiago Forte

Capture – start by gathering all relevant information into a system.

Organize – use a logical and consistent structure/tools to organize info

Distill – Review and refine notes to extract important info

Express – create and share content, solve problems, or apply knowledge



Framework #2 – “SCOURS”

Created by Bill & Don Tomoff 😊

See(k) – see or find something of interest/relevance

Capture – start by gathering all relevant information

Organize – use a logical and consistent structure/tools to organize info

Understand – review and refine notes to extract important info

Retrieve – quickly access content to put to use

Share – create and share content, solve problems, or apply knowledge

Why a Framework is Crucial for PKM

1. **Organization** - ensures that knowledge is systematically categorized
2. **Efficiency** - a consistent approach allows you to streamline your PKM processes
3. **Consistency** - enhances reliability and reduces errors
4. **Scalability** - a framework allows you to scale your PKM efforts without losing control over the information
5. **Review and Improvement** - continuous improvement leads to more effective knowledge management

[ChatGPT Thread](#)





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Tool Recommendations

Getting Started? Here's a Tool Resource List - 1

PKM - TOOLS & SERVICES ANALYSIS (USING THE <i>SCOURS</i> FRAMEWORK)						
Tools/Services	See(k)	Capture	Organize	Understand	Retrieve	Share
LastPass			X			
X1 Search	X				X	
GoodReader		X	X			
Adobe PDF Pro		X	X		X	X
Scanner Pro		X	X			X
Evernote	X	X	X	X	X	X
IFTTT		X	X			X
ChatGPT	X			X		X
ClaudeAI	X			X		X
Flipboard	X		X			X
Twitter	X					X
LinkedIn	X		X	X		X
YouTube	X			X		X
InstaPaper		X	X		X	X
Cloud Storage Services		X	X		X	X
Slack			X		X	X
Zoom					X	X
Excel & Google Sheets			X	X	X	X
Print Friendly PDF Extension		X				X

#narrowthepath - Here's a Tool Resource List - 2

PKM - TOOLS & SERVICES ANALYSIS (USING THE SCOURS FRAMEWORK)						
Tools/Services	See(k)	Capture	Organize	Understand	Retrieve	Share
LastPass			X			
X1 Search	X				X	
GoodReader		X	X			
Adobe PDF Pro		X	X		X	X
Scanner Pro		X	X			X
Evernote	X	X	X	X	X	X
IFTTT		X	X			X
ChatGPT	X			X		X
ClaudeAI	X			X		X
Flipboard	X		X			X
Twitter	X					X
LinkedIn	X		X	X		X
YouTube	X			X		X
InstaPaper		X	X		X	X
Cloud Storage Services		X	X		X	X
Slack			X		X	X
Zoom					X	X
Excel & Google Sheets			X	X	X	X
Print Friendly PDF Extension		X				X

Linked Version – Learn About Tools! ([LINK](#))

PKM - TOOLS & SERVICES ANALYSIS (USING THE SCOURS FRAMEWORK)						
Tools/Services	See(k)	Capture	Organize	Understand	Retrieve	Share
LastPass			X			
X1 Search	X				X	
GoodReader		X	X			
Adobe PDF Pro		X	X		X	X
Scanner Pro		X	X			X
Evernote	X	X	X	X	X	X
JFTTT		X	X			X
ChatGPT	X			X		X
ClaudeAI	X			X		X
Flipboard	X		X			X
Twitter	X					X
LinkedIn	X		X	X		X
YouTube	X			X		X
InstaPaper		X	X		X	X
Cloud Storage Services		X	X		X	X
Slack			X		X	X
Zoom					X	X
Excel & Google Sheets			X	X	X	X
Print Friendly PDF Extension		X				X





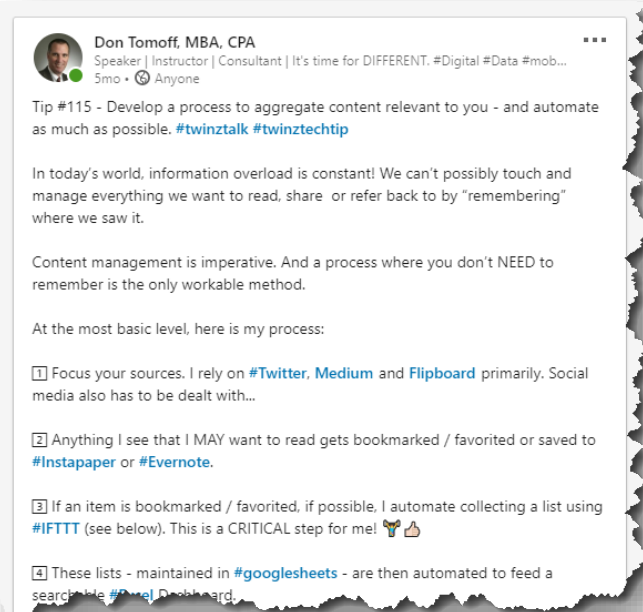
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Case Studies – Demos

Digital Document Management Tips

Develop a Content Aggregation Process



[LinkedIn Post](#)



"We can't possibly touch and manage everything we want to read, share or refer back to by "remembering" where we saw it."



Digital Document Management Tips

Create a Digital Content Library



"We can't possibly touch and manage everything we want to read, share or refer back to by 'remembering' where we saw it."



Don Tomoff, MBA, CPA

Speaker | Instructor | Consultant | It's time for DIFFERENT. #Digital #Data #mob...
7mo • Anyone

Tip #49 - Create (and maintain) a digital Content Library. #TwinzTalk #twinztechtip

Back in 2010, shortly after the #iPad was introduced, I started keeping a library of documents, files, videos, etc on the device. In June 2010, I presented an "iPad for Business" seminar with this concept as a business use case.

At that time, I had over 250 pieces of content being synced to GoodReader on my iPad (and ALWAYS available!).

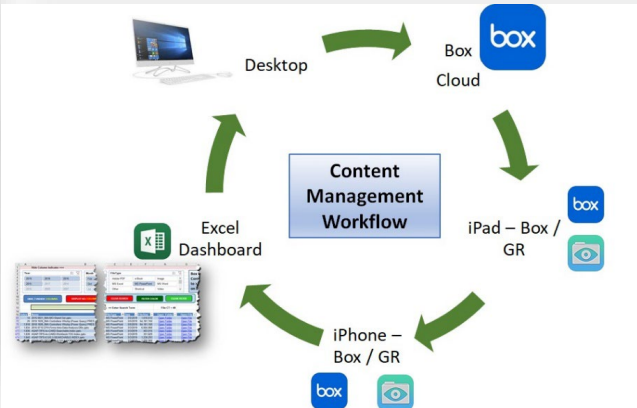
I have been doing this know for 9 years (9 YEARS!). Today I have over 2,500 pieces of content.

The content is managed via any device I choose - add, delete, organize, rename, annotate, etc. and it is instantly searchable across every platform. #justthewayweroll

Thanks to #Excel #PowerQuery, I also have a dynamic Excel dashboard of the contents. It updates with current content upon refresh...

This is the magic of #mobile, the #cloud and a little creative thinking. Bill French, I recall you did a blog post on this in 2010? It was my inspiration! #ThankYou

If you are looking for a way to manage your content, this is a...



New chat

PDF Document Analyzer

iPhone

GPT Focus Tip?

"What makes your (or your Team's) life easier?"

START. THERE. 🙌

iPad

PDF Document Analyzer

I'm here to help you with your PDF documents! Need a summary? Extract content from a specific section? Extract a list of Exhibits? Sure - give it a go!

By Don Tomoff

Let's Get Started...

10 Random Insights

PDF Document Analyzer

You
Let's Get Started...

PDF Document Analyzer
OK, I'm ready to help you with your documents. Here are a list of options I can help you with:

- 1 - Provide a 500 word overview
- 2 - Summarize a document
- 3 - Provide 10 top insights from the document
- 4 - Let's explore exhibits included in the document
- 5 - Quotes and Statistics included
- 6 - Action Items?
- 7 - Identify your own request

Please choose one of these options or let me know if you have a specific request related to a document!

👍 🧐 🗨️ 🔄

1 - UPLOAD DOCUMENT

2 - SELECT & ENTER A NUMBER

3 - RUN IT! ✓

Message PDF Document Analyzer...

ChatGPT can make mistakes. Consider checking important information.

PDF Document Analyzer

You
2023 11_MCK_gen-ai-a-guide-for-cfos... PDF

#6 = ACTION ITEMS?

PDF Document Analyzer
Based on the document analysis of "Gen AI: A guide for CFOs," here are 10 recommended action items for CFOs regarding the integration and optimization of generative AI (Gen AI) in their functions:

- 1 Understand Gen AI's Potential:** Familiarize yourself with Gen AI capabilities and limitations, especially in generating new, unstructured content like text, images, and audio. Understanding the technology is crucial for effective implementation and risk management.
- 2 Identify Value Creation Opportunities:** Actively seek and prioritize projects within your organization that can significantly benefit from Gen AI, focusing on those that deliver substantial value creation.
- 3 Allocate Resources Wisely:** Ensure that projects with the highest potential for value creation, including those involving Gen AI, receive the necessary funding and resources.
- 4 Experiment and Learn:** Engage with Gen AI technologies firsthand, such as using tools like OpenAI's ChatGPT, to gain a practical understanding of their capabilities and limitations.

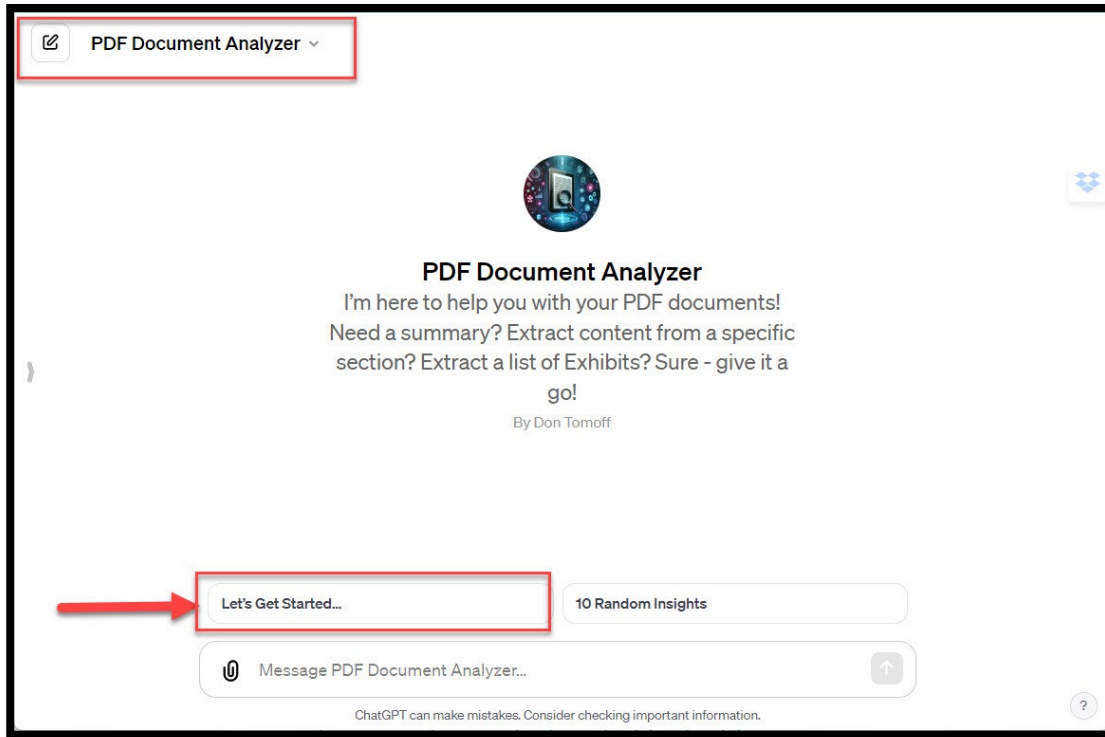
Message PDF Document Analyzer...

ChatGPT can make mistakes. Consider checking important information.

ChatGPT Custom GPT - PDF Document Analyzer

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DEMO - Custom GPTs – PDF Document Analyzer



1. GPTs are basically ChatGPT “apps”
2. Instructions, knowledge docs, etc. can be built into your custom GPT
3. ***PDF Document Analyzer*** is a perfect example



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Wrap Up

Final Thought...



Think Big

Act Small

Learning Objectives

1. Recall the key concepts and principles of personal knowledge management (“PKM”) and how they apply to business and your career. ✓
2. Recognize why a PKM system is essential for career growth and innovation. ✓
3. Determine a strategy for implementing and leveraging technologies for a PKM system. ✓
4. Select various tools to start your PKM process. ✓

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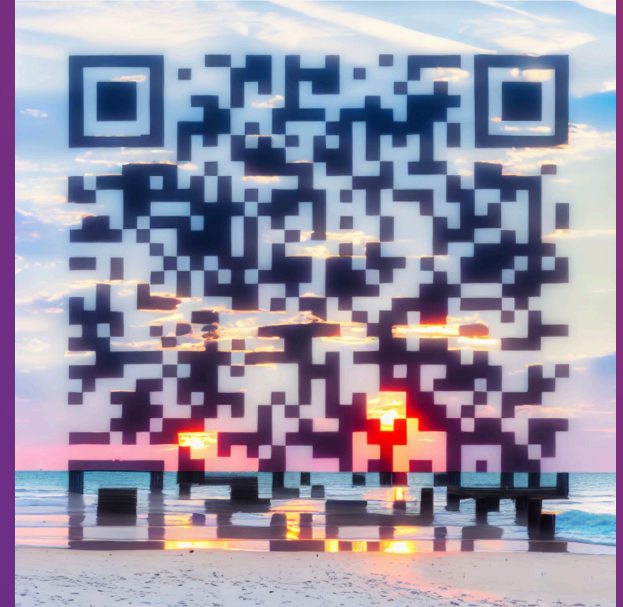
Questions?



Donald R. Tomoff, MBA, CPA
Invenio Advisors, LLC



Thank you



Don LinkedIn – Let's Connect!

What is the Business Learning Institute?

BLI is a training affiliate of the AICPA-CIMA. BLI's mission is to deliver competency-based courses, content and community that enhance learning and foster organizational and executive leadership.

BLI has grown into the largest provider of on-site training in the country. Pam and the Customized Learning Solutions team have grown the business in three core segments – Corporate, Firm and Government.

The BLI Curricula

Today's business environment demands the need to gain competencies and share strategic knowledge. BLI delivers competency-based curriculum, courses, content, and community to enhance learning and grow intellectual capital for organizational and executive leadership.

These soft skills are essentially people skills – the non-technical, intangible, performance skills that determine your strengths as a leader, manager, and team member.

STRATEGIC MANAGEMENT

Strategic conversation reflects the dynamics between the organization and its environment. The closer the language reflects current and potential customer dynamics, the higher the company's profit potential.

LEADERSHIP DEVELOPMENT

Great leadership is one of the most valued of all human activities. Modern myth holds that "leaders are born not made," but leadership is a set of observable and learnable practices - it is the process people use when they bring out the best in others and themselves.

BUSINESS MANAGEMENT

As the business world moves at an incredible pace, keeping up is a key to success. Today's financial managers must be able to translate strategy to operational and corporate growth.

TECHNOLOGY AND COMPUTER SKILLS

Harness the technology you use every day to make your business life easier and allow you to work smarter.

PERFORMANCE MEASUREMENT MANAGEMENT

Executives and managers must effectively transform their firms or companies into high performance organizations and progressively identify and develop the appropriate core competencies and link them to their business strategies.

COMMUNICATION SKILLS

Many people in the business field cannot communicate effectively and, even more damaging, don't realize it. Success is not defined solely by a product line or service - it relies on relationships formed and maintained through skillful communications. Your competitors know this. Do you?

TECHNICAL EXPERTISE

Keeping up with technical competencies is a core business requirement for financial professionals. Staying attuned to the latest changes, updates, and regulations are necessary components to staying competitive in an ever-changing business environment.

Please note that many programs in this catalog are available in webcast format. Contact a BLI Customized Learning consultant if you are interested in a webcast.