



KNOWLEDGEROOTS

Past Experience / Performance Sheet

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EXECUTIVE SUMMARY

Collaborative Shared Technologies LLC® provides management consulting, Knowledge Management, AI governance, business process reengineering, workforce readiness, and enterprise modernization support. This past performance sheet summarizes representative experience delivering enterprise process standardization, governance frameworks, knowledge transfer, workflow modernization, executive recommendations, and technology-enabled transformation for government and industry environments.

Project 1: Enterprise Workforce Onboarding, Offboarding, and Organizational Knowledge Transfer Modernization

Customer	NewGen Technologies LLC, Department of Defense (DoD), U.S. Navy
Period	2022-2023
Contract Value	\$12M
Technologies	ServiceNow; SharePoint
Scope	Provided enterprise-level business process reengineering, organizational workflow integration, and knowledge management advisory services to modernize and standardize workforce onboarding, offboarding, and enterprise access provisioning processes for a large, distributed organization operating in a secure, undisclosed environment.
Services Provided	Business process reengineering; organizational workflow integration; onboarding/offboarding standardization; knowledge transfer planning; governance recommendations; stakeholder requirements elicitation.
Results / Outcomes	Established a standardized enterprise onboarding/offboarding model; addressed redundant system usage across four disconnected tools; reduced reliance on manual, email-based coordination; improved cross-functional visibility, governance, audit readiness, and process accountability; positioned the organization for future automation and digital workflow implementation.
Relevance to Virginia/Maryland Buyers	Relevant to state and local agencies seeking process standardization, knowledge transfer, workforce readiness, governance, digital modernization, training support, and practical implementation services.

Project 2: Enterprise Knowledge Management Benchmarking, Strategic Analysis, and Program Modernization

Customer	Leidos, DoD, Pentagon
Period	2024-2025
Contract Value	\$30M
Technologies	Microsoft SharePoint; Microsoft Teams; Microsoft OneDrive; Microsoft Outlook; Microsoft Power Platform; Confluence; knowledge repositories; collaboration platforms; Microsoft Office Suite
Scope	Conducted enterprise Knowledge Management benchmarking and strategic analysis supporting the Department of Defense Chief Information Officer, including consolidation and analysis of RFI responses from multiple prime contractors and subcontractors.

Services Provided	Enterprise KM benchmarking; strategic analysis; governance assessment; knowledge capture and sharing analysis; performance measurement assessment; executive recommendations; modernization roadmap development.
Results / Outcomes	Established a benchmark of leading federal and industry Knowledge Management capabilities; identified opportunities to improve KM governance, collaboration, knowledge capture, organizational learning, performance measurement, and digital transformation; delivered executive-level recommendations and an implementation roadmap.
Relevance to Virginia/Maryland Buyers	Relevant to state and local agencies seeking process standardization, knowledge transfer, workforce readiness, governance, digital modernization, training support, and practical implementation services.

Project 3: Enterprise Knowledge Management, Governance, and AI-Enabled Program Modernization	
Customer	Peraton Inc., HQ Defense Intelligence Agency (DIA)
Period	2025-2026
Contract Value	\$15M
Technologies	SharePoint; AI-enabled knowledge management tools; enterprise collaboration and content management platforms; data visualization and KPI reporting tools; Microsoft Visio; Microsoft Project
Scope	Provided enterprise-level management consulting, organizational transformation, governance development, business process reengineering, Knowledge Management, and Artificial Intelligence governance support for a large organization operating in a classified environment.
Services Provided	KM strategy; KM governance framework; AI governance framework; knowledge audit; maturity assessment; gap and root cause analysis; stakeholder engagement; SOPs; process maps; taxonomy; ontology; records-aligned content architecture; SharePoint access controls; training; implementation roadmap.
Results / Outcomes	Established the organization's first formal enterprise Knowledge Management and governance capability; reduced continuity risks associated with knowledge silos and workforce attrition; standardized repeatable processes through SOPs and process formalization; enabled records management and information governance alignment; implemented SharePoint security groups and permission structures; provided leadership with KPI visibility through AI-enabled dashboards.
Relevance to Virginia/Maryland Buyers	Relevant to state and local agencies seeking process standardization, knowledge transfer, workforce readiness, governance, digital modernization, training support, and practical implementation services.
Project 4: Enterprise Workforce Knowledge Management Modernization & Implementation	
Customer	United States Air Force, Active-Duty, DoD
Period	2002-2022 (20 years)
Contract Value	\$ 55M
Technologies	Power Automate, Power Apps; SharePoint, Teams, Zoom, Microsoft Access, Dreamweaver, BC Remedy, Active Directory,

Scope	Directed enterprise-wide Knowledge Management, Information Governance, Records Management, Digital Modernization, and Organizational Learning initiatives supporting mission-critical operations across the United States Air Force and Defense Intelligence Community. Planned, designed, implemented, and sustained enterprise knowledge-sharing environments, SharePoint collaboration platforms, workforce readiness programs, governance frameworks, and business process modernization initiatives supporting organizations ranging from hundreds to more than 22,000 personnel. Led requirements analysis, stakeholder engagement, change management, process improvement, knowledge transfer, and workforce transformation efforts to improve mission effectiveness, information accessibility, compliance, and organizational performance.
Services Provided	Records Management; Privacy Act Compliance; Information Governance; SharePoint Development & Administration; Enterprise Content Management (ECM); Business Process Reengineering (BPR); Knowledge Management Strategy & Implementation; Knowledge Capture & Transfer; Organizational Change Management; Training Development & Delivery; Workflow Automation; Digital Transformation; Taxonomy & Metadata Design; Requirements Analysis; Governance Policy Development; Knowledge Repository Administration; Workforce Development; Lessons Learned Programs; Performance Measurement & KPI Development.
Results / Outcomes	Established and standardized enterprise Knowledge Management and Information Governance programs supporting operational excellence across multiple Air Force and Intelligence Community organizations. Directed enterprise KM operations support organizations of up to 22,000 personnel while aligning workforce capabilities with mission objectives. Implemented SharePoint modernization initiatives that improved content discoverability and knowledge accessibility by more than 50%. Delivered enterprise SharePoint and knowledge management training programs that generated approximately \$6.5 million in cost savings and cost avoidance. Developed governance frameworks, records management policies, and information lifecycle processes that strengthened compliance, workforce continuity, organizational learning, and mission readiness. Created performance measurement frameworks and KPIs enabling leadership visibility into workforce effectiveness, platform utilization, and knowledge-sharing maturity.
Relevance to Virginia/Maryland Buyers	Highly relevant to Virginia and Maryland state agencies, county governments, public safety organizations, education systems, transportation agencies, healthcare organizations, and public sector entities seeking enterprise knowledge management, digital modernization, process standardization, organizational change management, workforce readiness, succession planning, records management, information governance, SharePoint modernization, knowledge transfer, training support, business process improvement, and AI-ready information management foundations. Proven experience implementing practical, scalable solutions within highly regulated government environments requiring compliance, operational efficiency, and workforce continuity.

CORE SERVICE AREAS

Knowledge Management | AI Governance | Enterprise Governance | Management Consulting | Business Process Reengineering | Process Improvement | Organizational Change Management | Workforce Readiness | On-the-Job Training Program Development | SharePoint / Microsoft 365 | Records & Information Management | Digital Modernization

