# Knowledge Operations

## Methodology, Platform, and Team

Greg DeVore

ScreenSteps

# Agenda

**What you will learn:**

- The unique challenges of capturing and transferring Operational Knowledge

- Knowledge Operations methodology, tools, and teams

# Knowledge Management

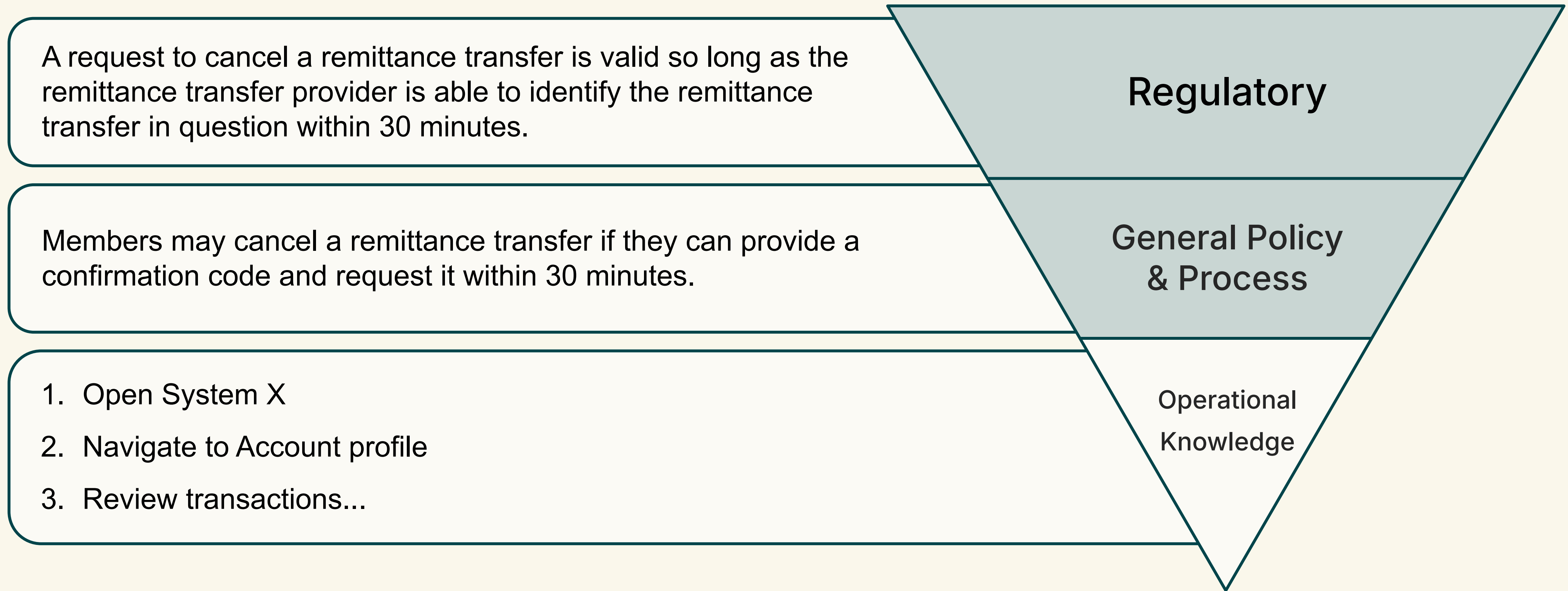Knowledge Management is very organized, sitting in a neat and clean office



# Knowledge Ops

Knowledge Ops is like a first-responder, dirty, tired, but fulfilled because of the impact they are having

# Operational Knowledge

A request to cancel a remittance transfer is valid so long as the remittance transfer provider is able to identify the remittance transfer in question within 30 minutes.

**Regulatory**

Members may cancel a remittance transfer if they can provide a confirmation code and request it within 30 minutes.

**General Policy & Process**

1. Open System X
2. Navigate to Account profile
3. Review transactions...

Operational Knowledge

# What is different about Operational Knowledge?

Complex

Detailed

Unique

Constantly Changing

# What does it impact?

ONBOARDING

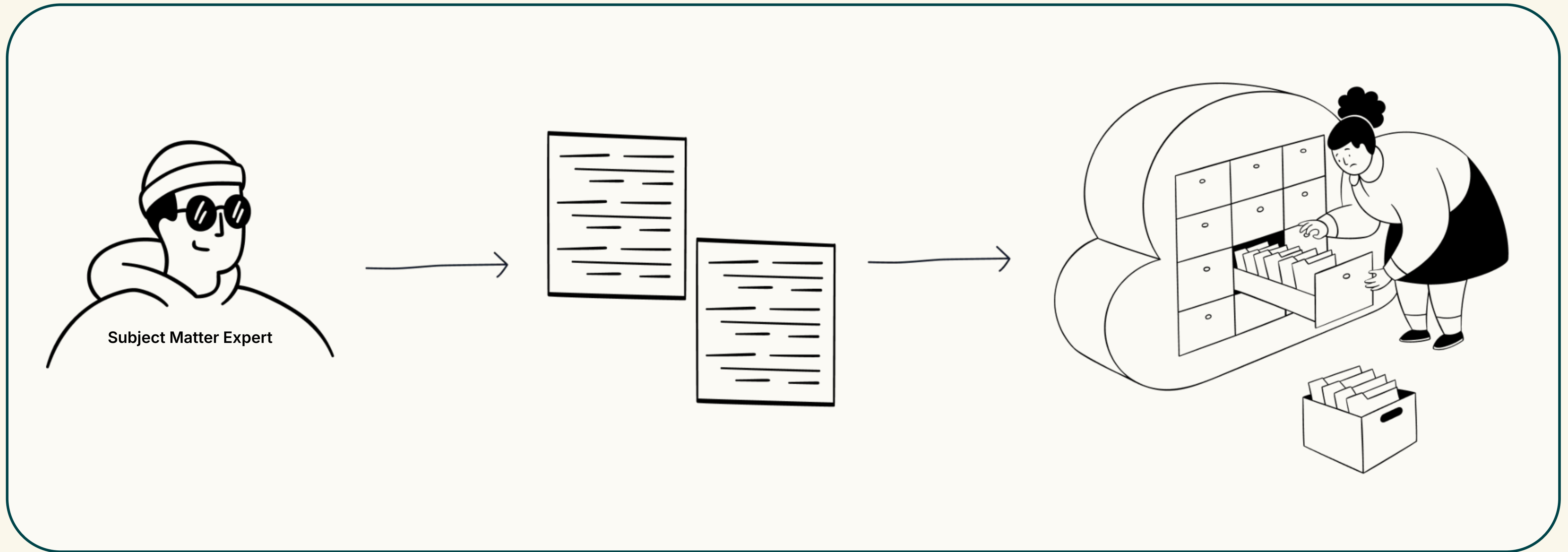CONSISTENCY

SUPERVISOR
BANDWIDTH

AI

CHANGE
MANAGEMENT

# The Current State of Operational Knowledge Transfer
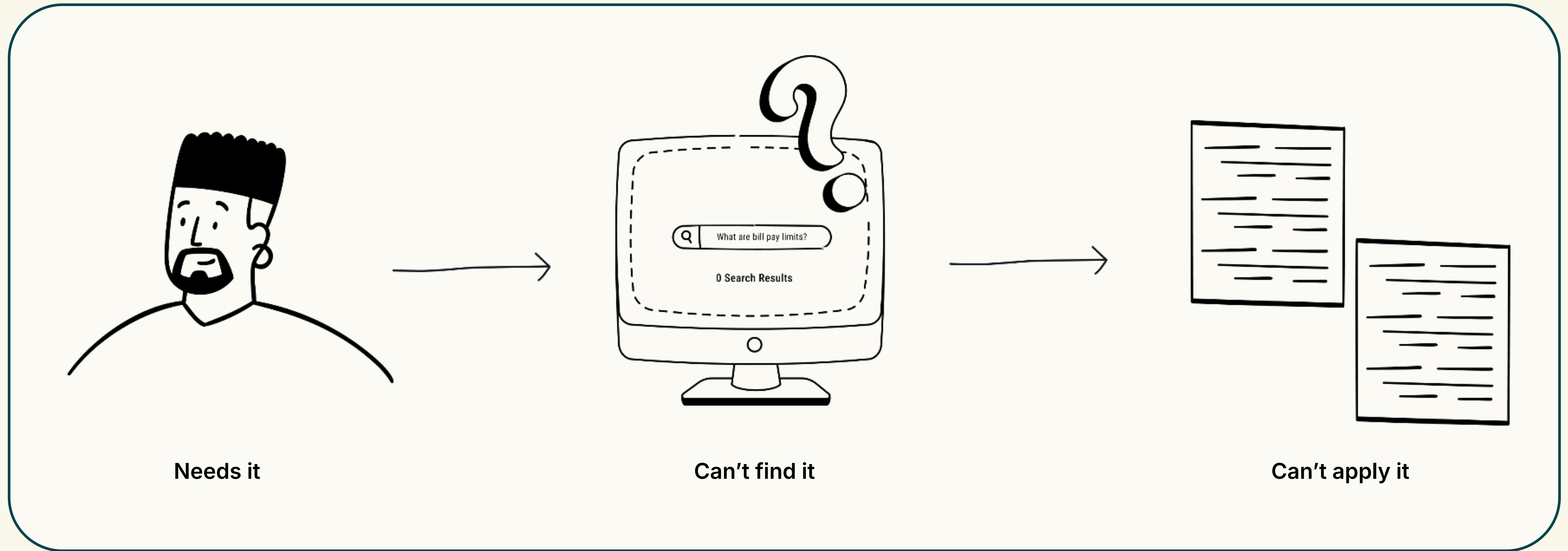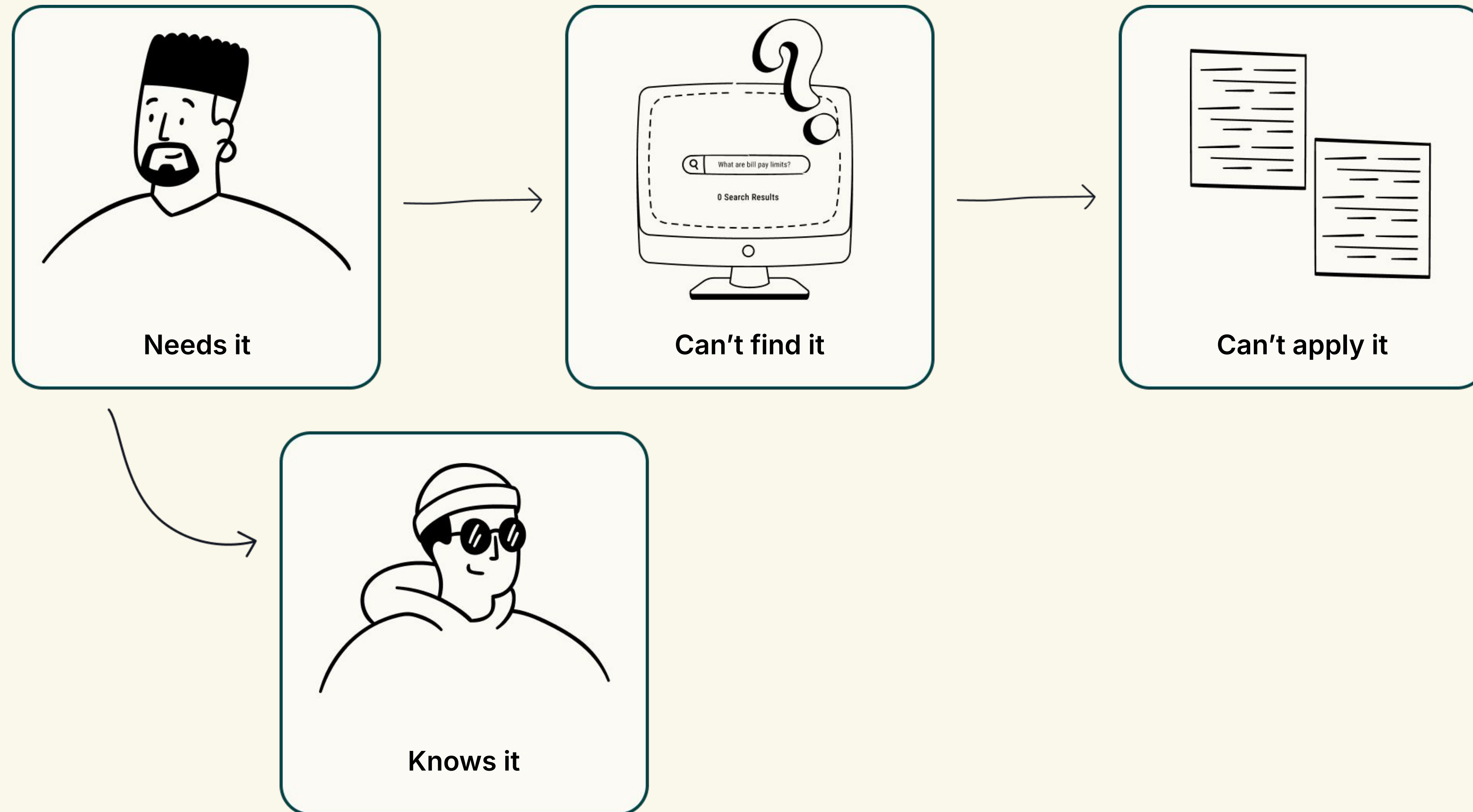
# Shadowing



Subject Matter Expert
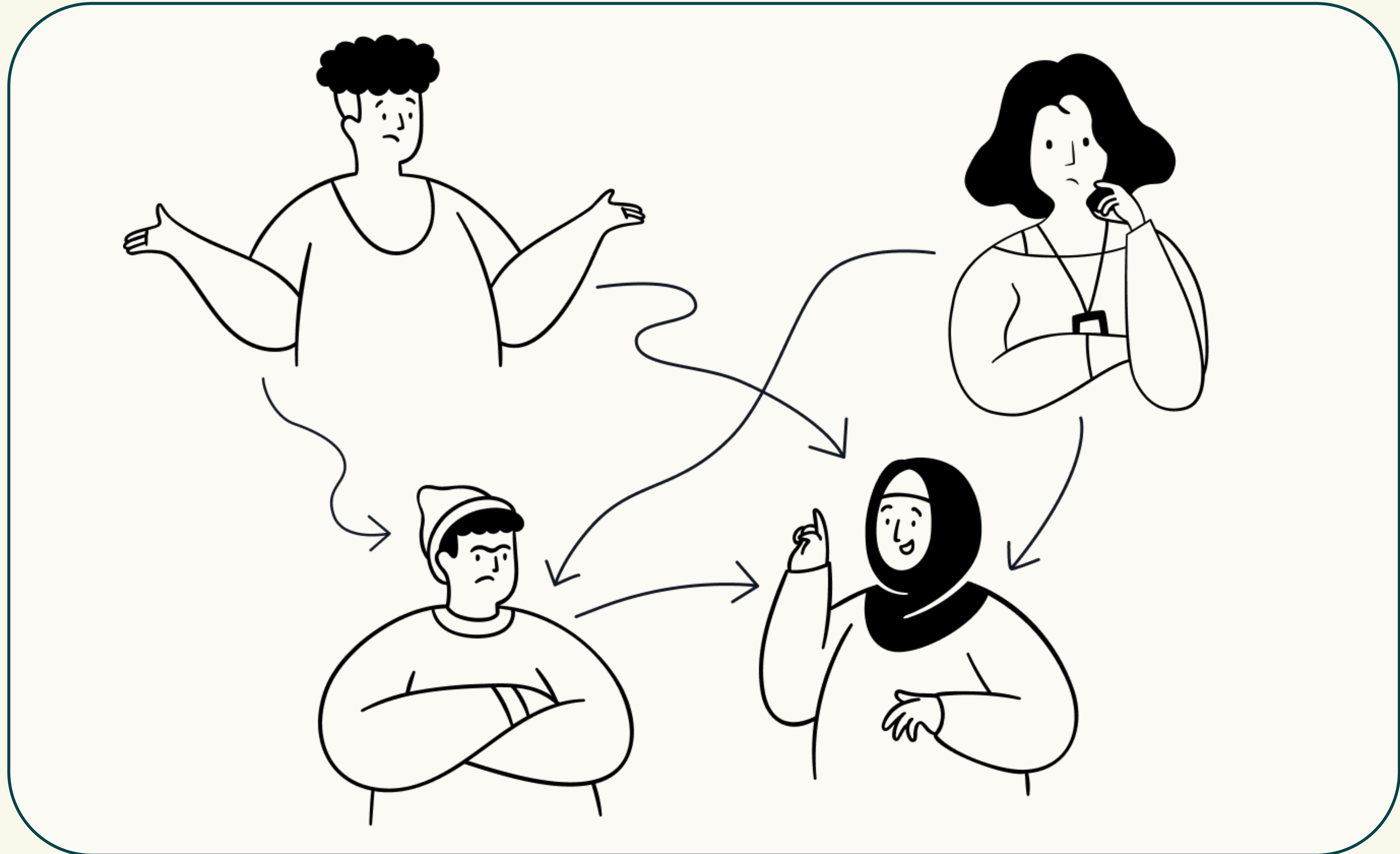
# Teams Try to Capture Operational Knowledge in SharePoint



Subject Matter Expert

# Teams Try to Capture Operational Knowledge in SharePoint



**Needs it**

What are bill pay limits?

0 Search Results

**Can't find it**

**Can't apply it**

# Teams Try to Capture Operational Knowledge in SharePoint

**Needs it**

**Can't find it**

What are bill pay limits?

0 Search Results

**Can't apply it**

**Knows it**

# Tribal Knowledge

# Knowledge Ops Maturity Model

**Employee Independence** →

| 1. Tribal | 2. Document | 3. Guide |

**Phone a Friend**

All knowledge is stuck in people's heads. Training happens through shadowing.

**Phone a Friend**

SOPs are created, but people still turn to supervisors and co-workers when they don't know what to do.

**Use a GPS**

Employees Find & Follow digital guides to work confidently, consistently, and efficiently.

# The Behavior We Need to Change



Subject Matter Expert

# Knowledge Operations



A Methodology

A Platform

A Team

# The Methodology:
# Find & Follow

# Find & Follow is a Knowledge Transfer methodology that:
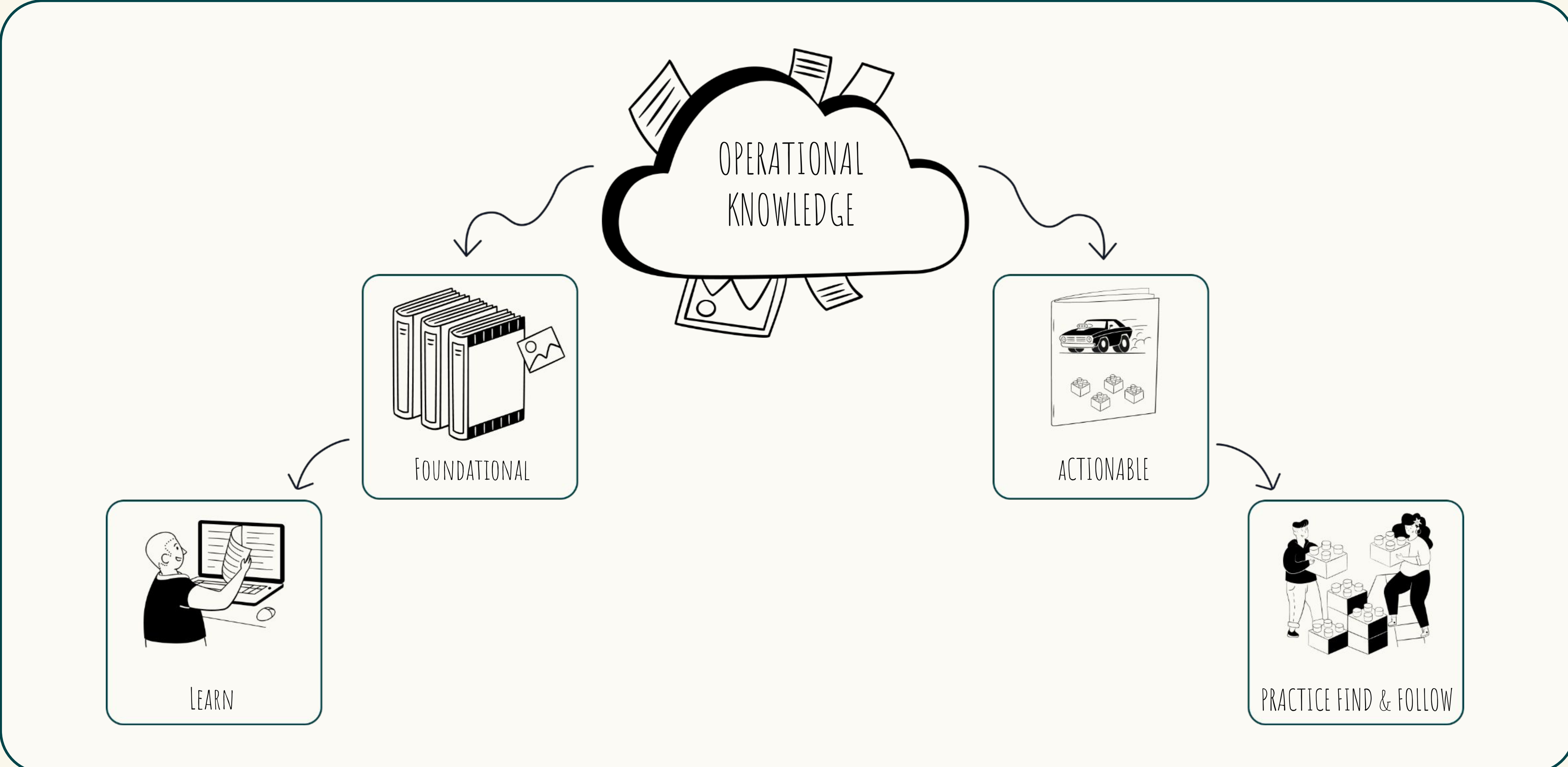
# The Standard We Need to Meet



Findable

Followable

Scannable

# Tools:
# The Knowledge Ops Platform

# Knowledge Ops Platform
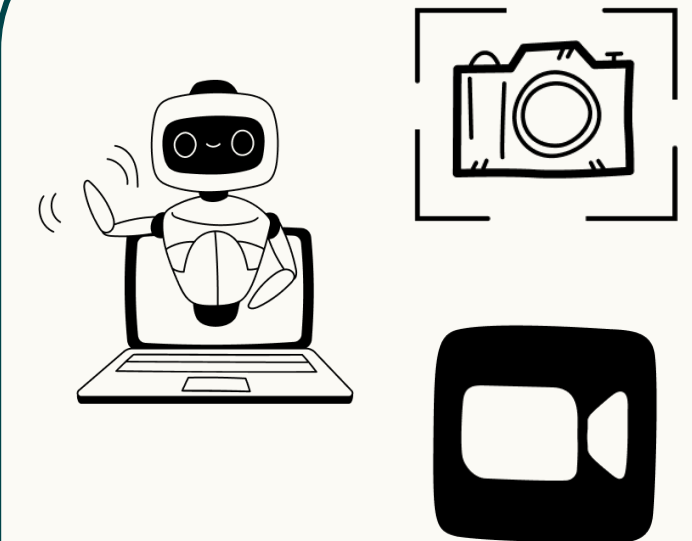## Single Source of Truth for Operational Knowledge



Micro-COURSES

Artiles, Checklists, and Decision Trees

CHANGE notifications

Pushed Into the Workflow

Integrated knowledge capture

# What Does a Knowledge Ops Platform Do?

| Capture | Empower | Maintain |
|---------|---------|----------|

It supports the Find & Follow Methodologoy

# Capture: Non-integrated tools

## Word + Screen Grab
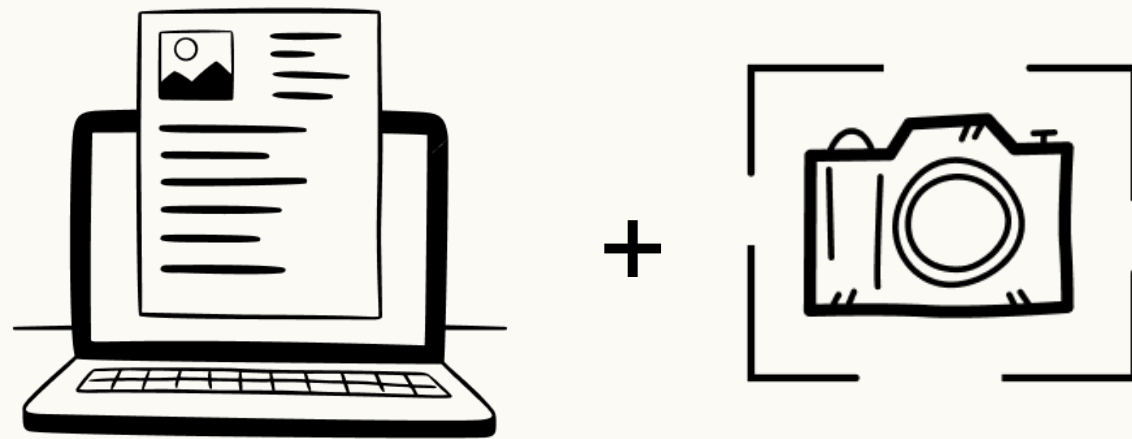
- Time-consuming
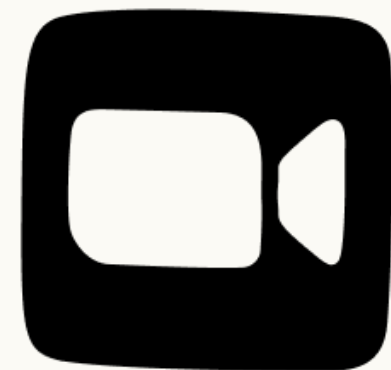- Difficult to make followable/scannable
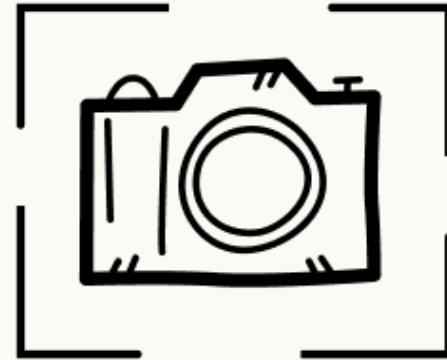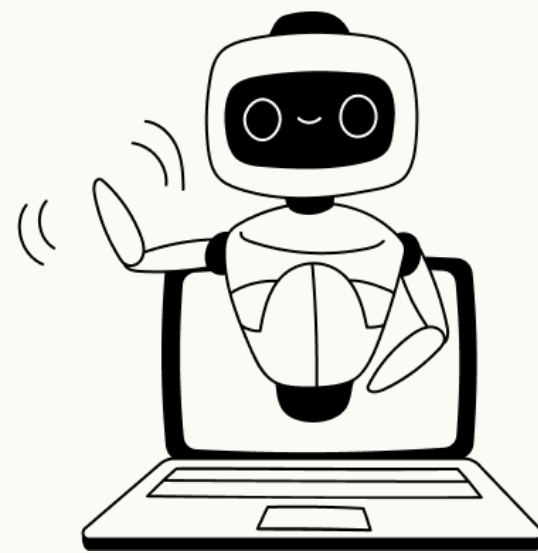- Difficult to update

## Video
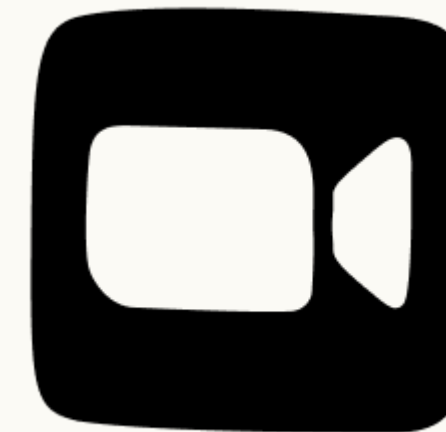
- Impossible to update
- How do you organize them?

## Automated Capture (Scribe, Tango, etc.)
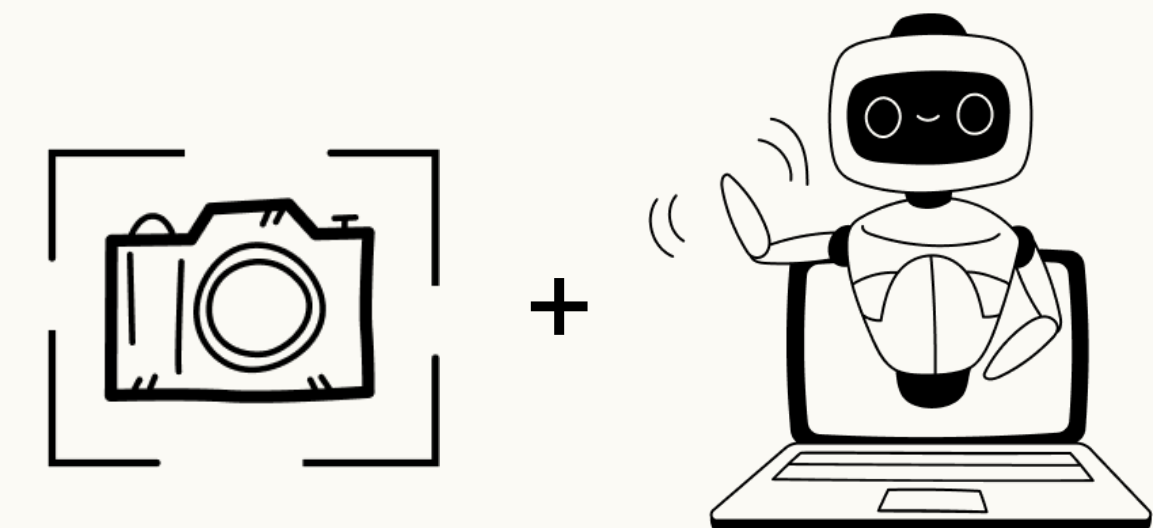
- Can't clarify complex procedures
- Doesn't separate foundational and actionable knowledge
- Not easy to organize in a way that you can find and update

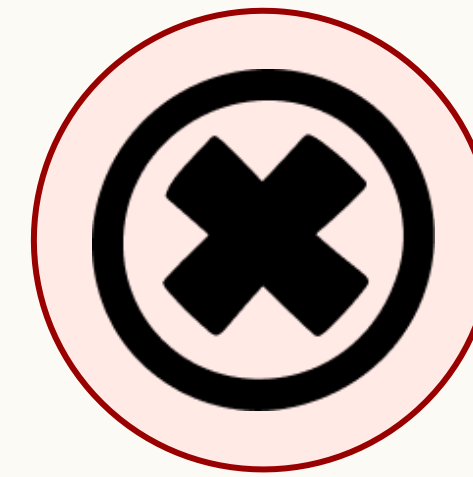# Knowledge Operations - Integrated Knowledge Capture

- AI audio capture for both foundational and actionable knowledge
  - SMEs don't need to know how to document
- Integrated screenshot and video capture
- Rapid authoring tool
- All content is organized in a single location so employees can find it and SMEs can update it

# Empower



- PowerPoint decks
- Word/PDF files
- Hour-long webinar recordings



- Not findable, followable, and scannable
- Combines foundational and actionable knowledge
- Often outdated

# Empower



- Interactive checklists
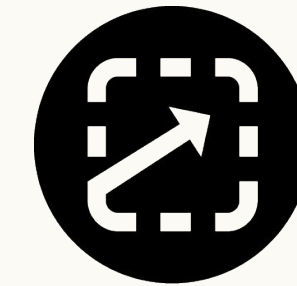- Decision trees
- Micro-courses



- Integrations with Teams, Slack, and any website
- or web application your employees use

# Change Notifications



- Sent through email, Slack, or Teams
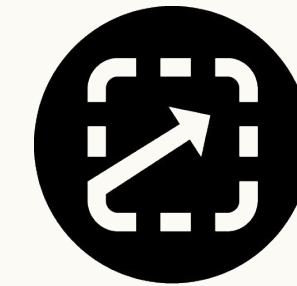- Messages get lost
- No accountability

**SCREEN**STEPS

- Easily findable
- Connects to relevant guides
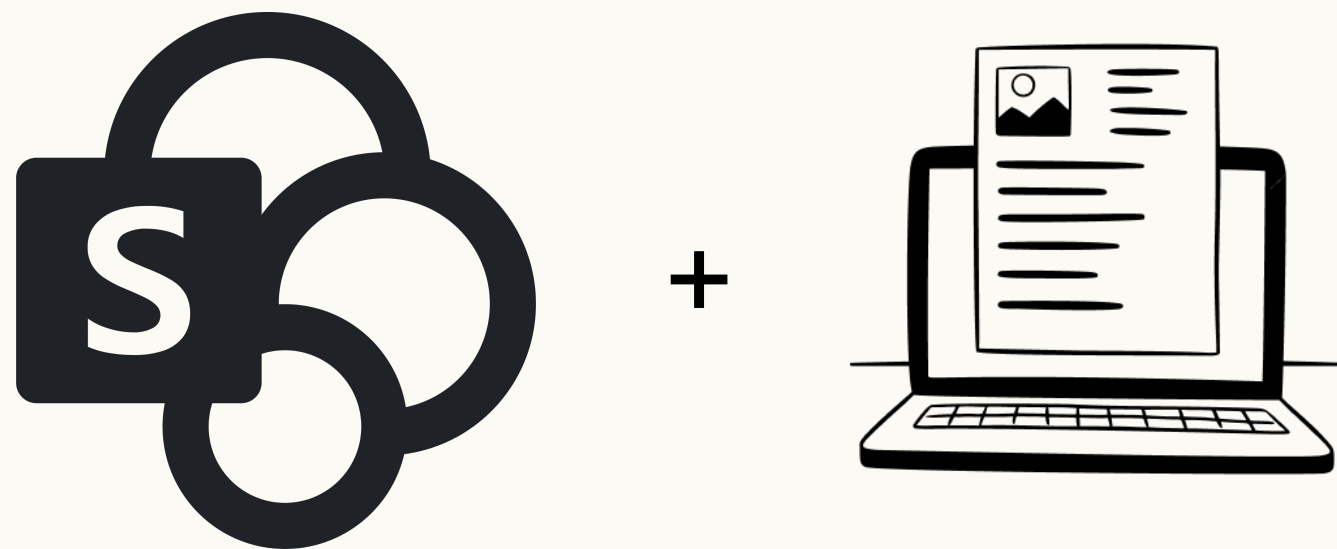- Tracks acknowledgement

# Reporting

## SharePoint

- Difficulty to see which guides employees are using
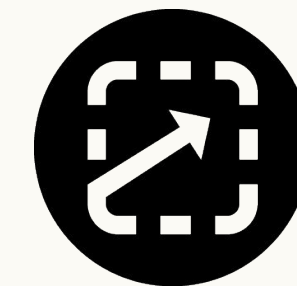- Difficult to see what they are searching for

## SCREENSTEPS

- Usage reports
- Search reports

# Maintenance

**SharePoint + Laptop**

- Feedback is limited to surveys, interviews, or email
- Content is difficult to update
- No tools for tracking content accuracy

**SCREENSTEPS**

- Feedback loops
- Content Certification
- Rapid updates

# Tools that are cobbled together

| LMS | SharePoint/Shared Drive | Email | Teams/Slack |



COURSES

JOB AIDS, SOPs,
Training decks

CHANGE NOTIFICATIONS
WEEKLY TIPS

CHANGE NOTIFICATIONS
HOW DO I QUESTIONS

Capture Bottlenecks

Not Findable, Followable,
or Maintainable

Tribal Knowledge
Dumping Ground

# Knowledge Ops Platform
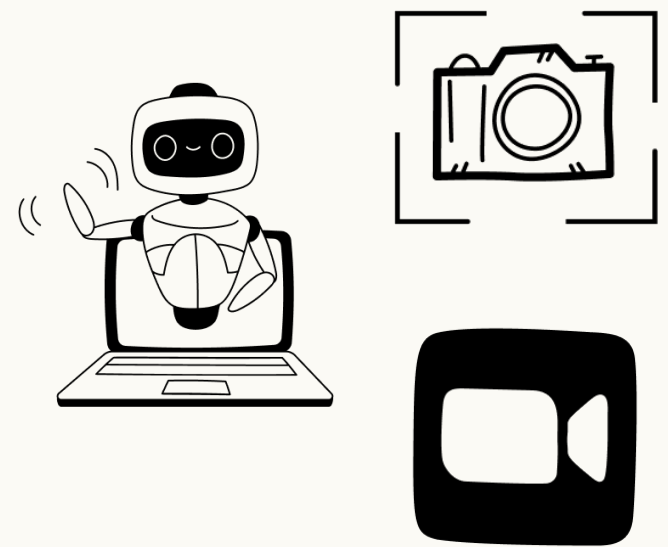## Single Source of Truth for Operational Knowledge



Micro-COURSES

Artiles, Checklists, and Decision Trees
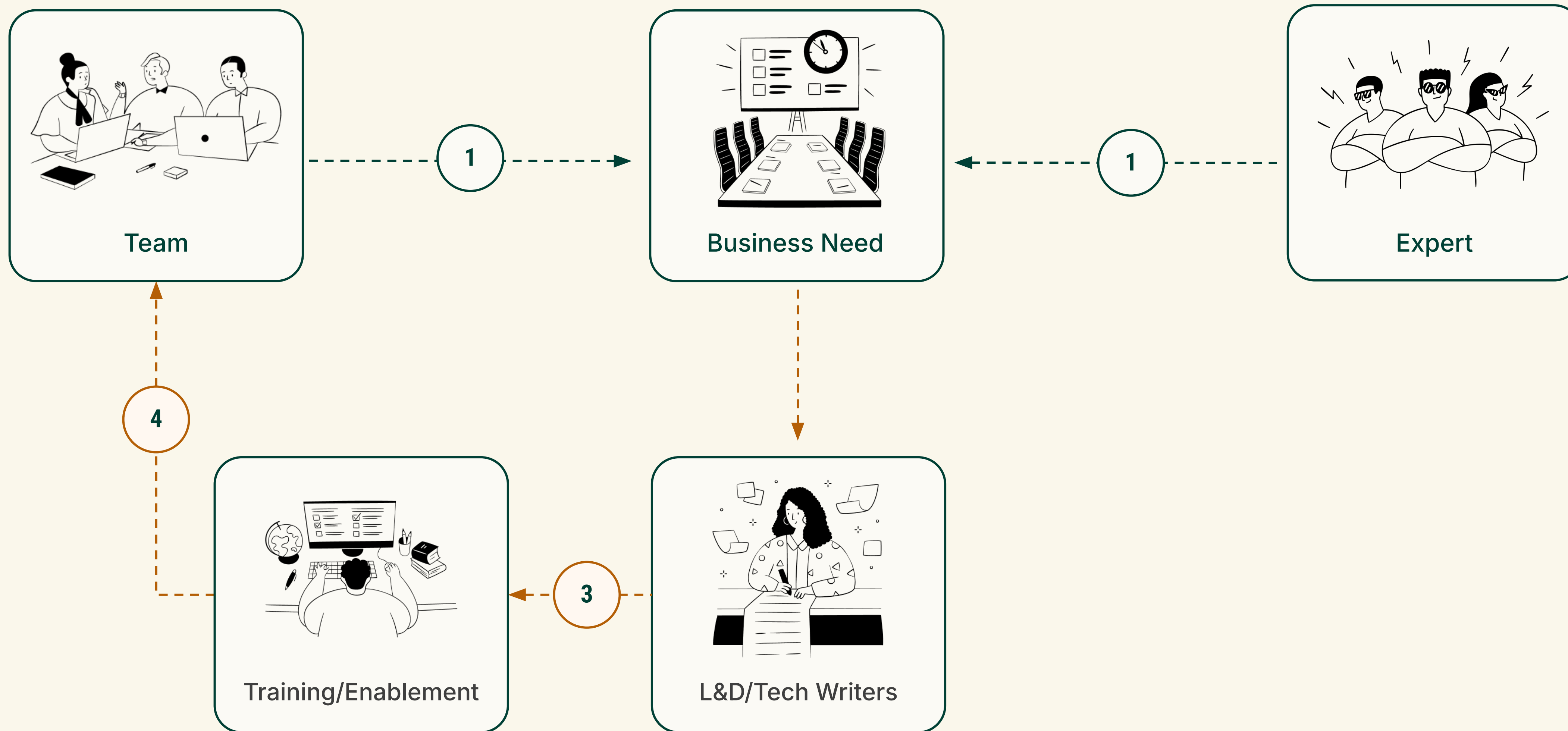
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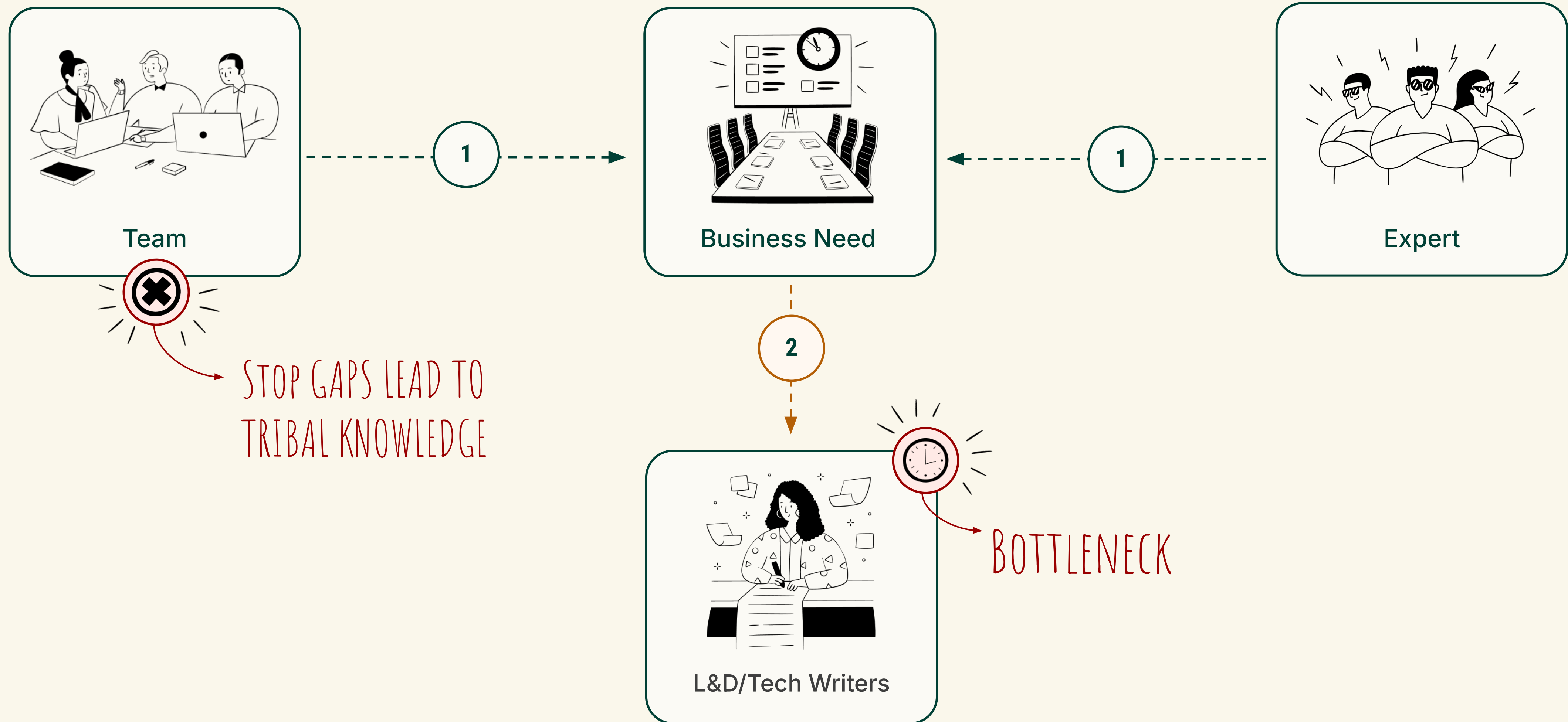
# A Workflow That Supports Knowledge Hygiene

**Knowledge Hygiene =**
Confidence from all parties that knowledge is
accurate, useful, and usable

**Team:**
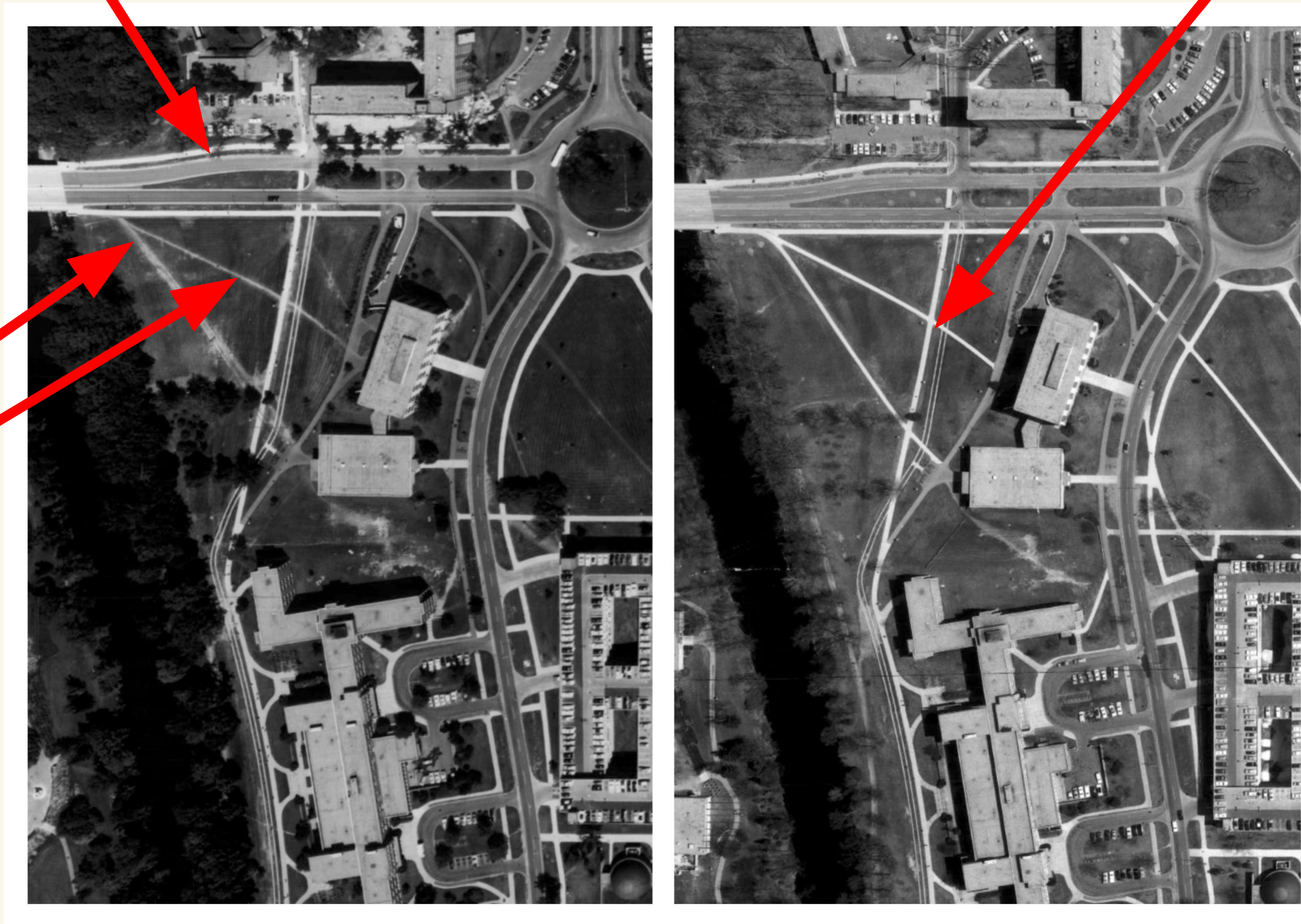**The Knowledge Ops Team**

# Traditional Setup

# Traditional Setup



Team

Business Need

Expert

**1**

**1**

**2**

Stop gaps lead to tribal knowledge

L&D/Tech Writers

Bottleneck

# Traditional Setup



Pre-designed Paths

Solution: Pave the path

Paths people actually take

Photo from Michigan State University Aerial Imagery. Source: https://statenews.com/article/2023/10/desire-paths-how-the-art-of-deviant-pedestrianism-shapes-msu-campus

# Traditional Setup



Traditional L&D

Stop gaps

Solution: Embedded Knowledge Champions

Photo from Michigan State University Aerial Imagery. Source: https://statenews.com/article/2023/10/desire-paths-how-the-art-of-deviant-pedestrianism-shapes-msu-campus
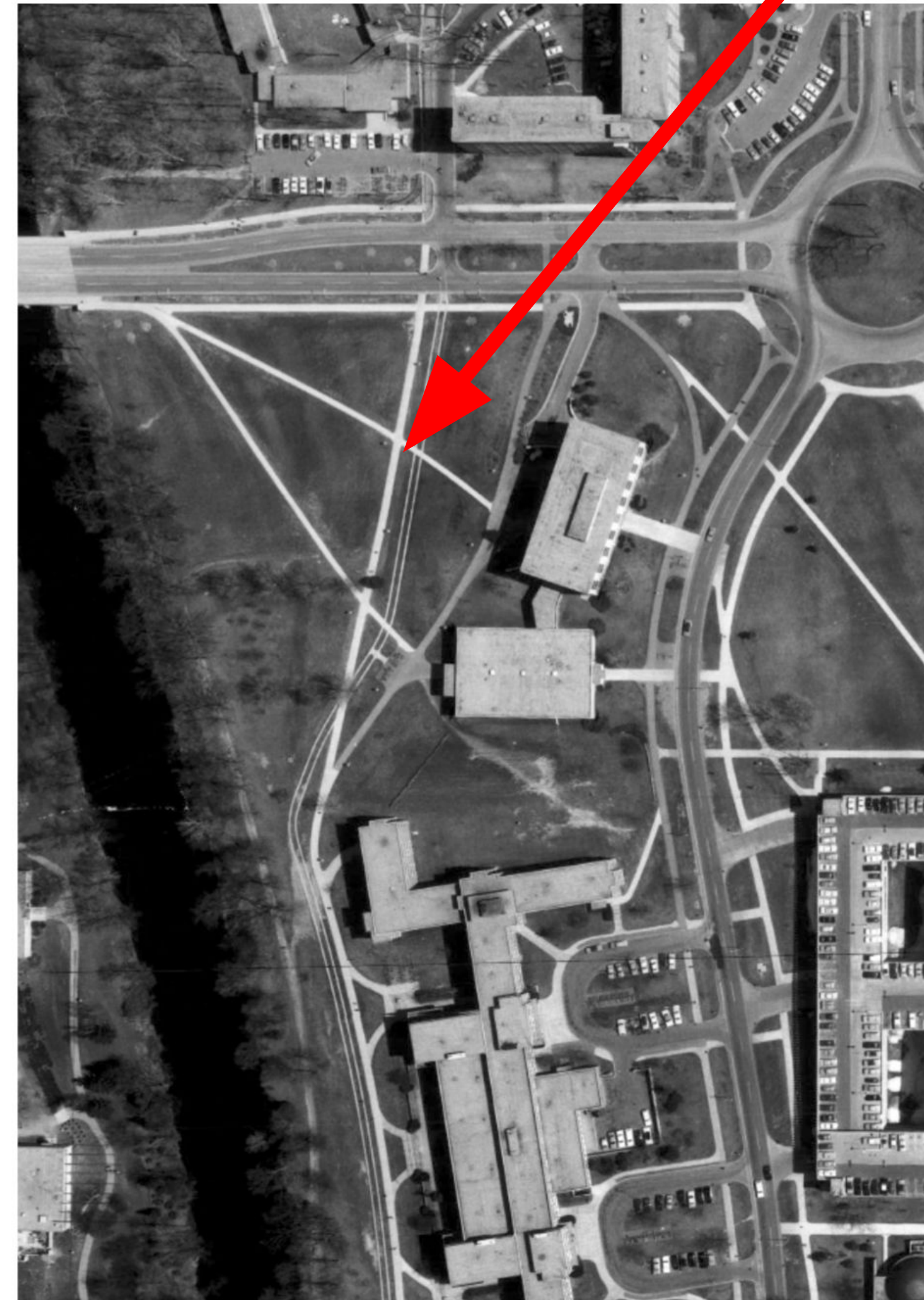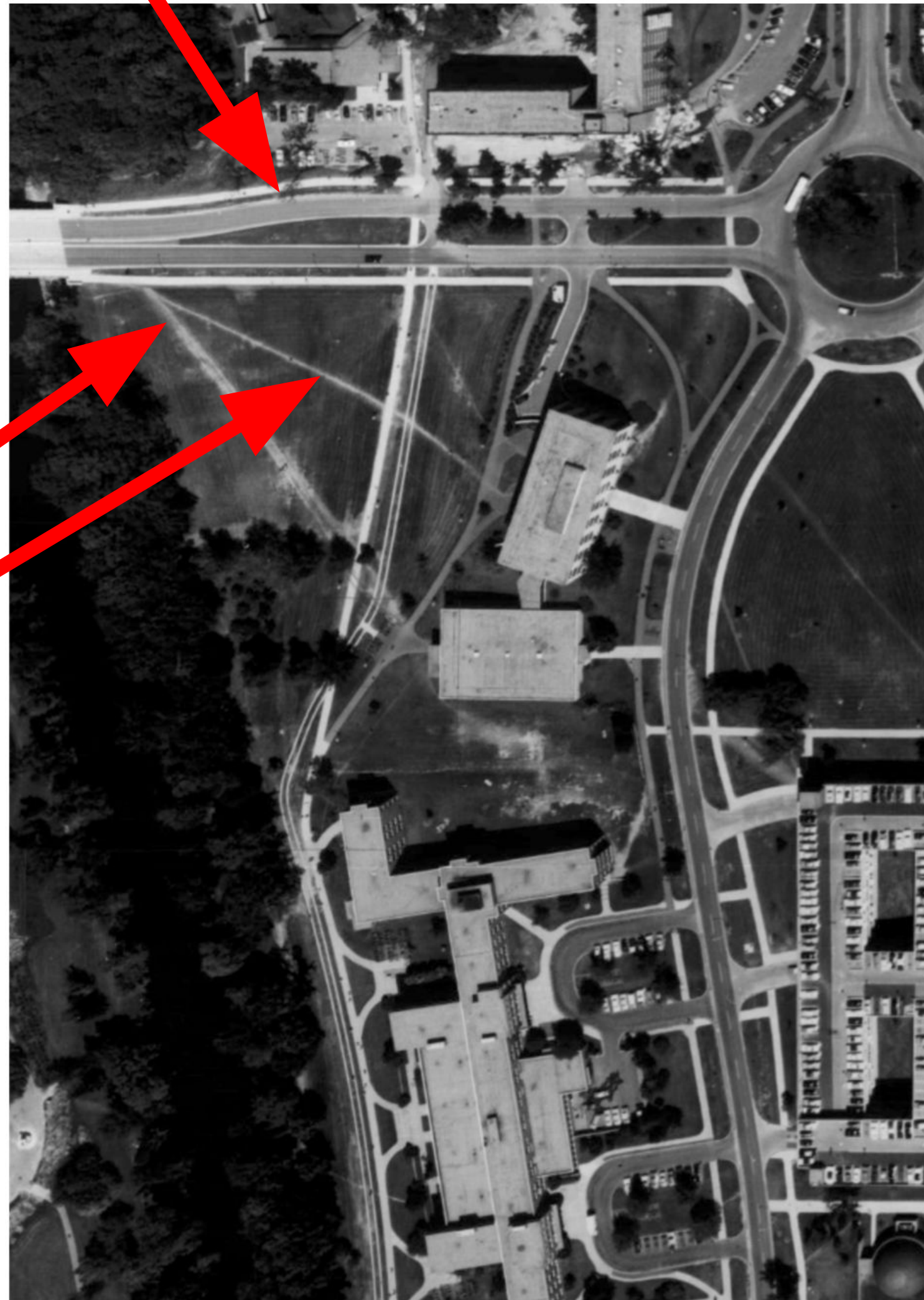
# Rethinking the Team

# What does this team look like?



**Embedded Knowledge Champion**



**A Knowledge Ops Coach**

# Centralized Knowledge



HR

Experts

Single Source
of Truth

Legal

Team
Knowledge Champion
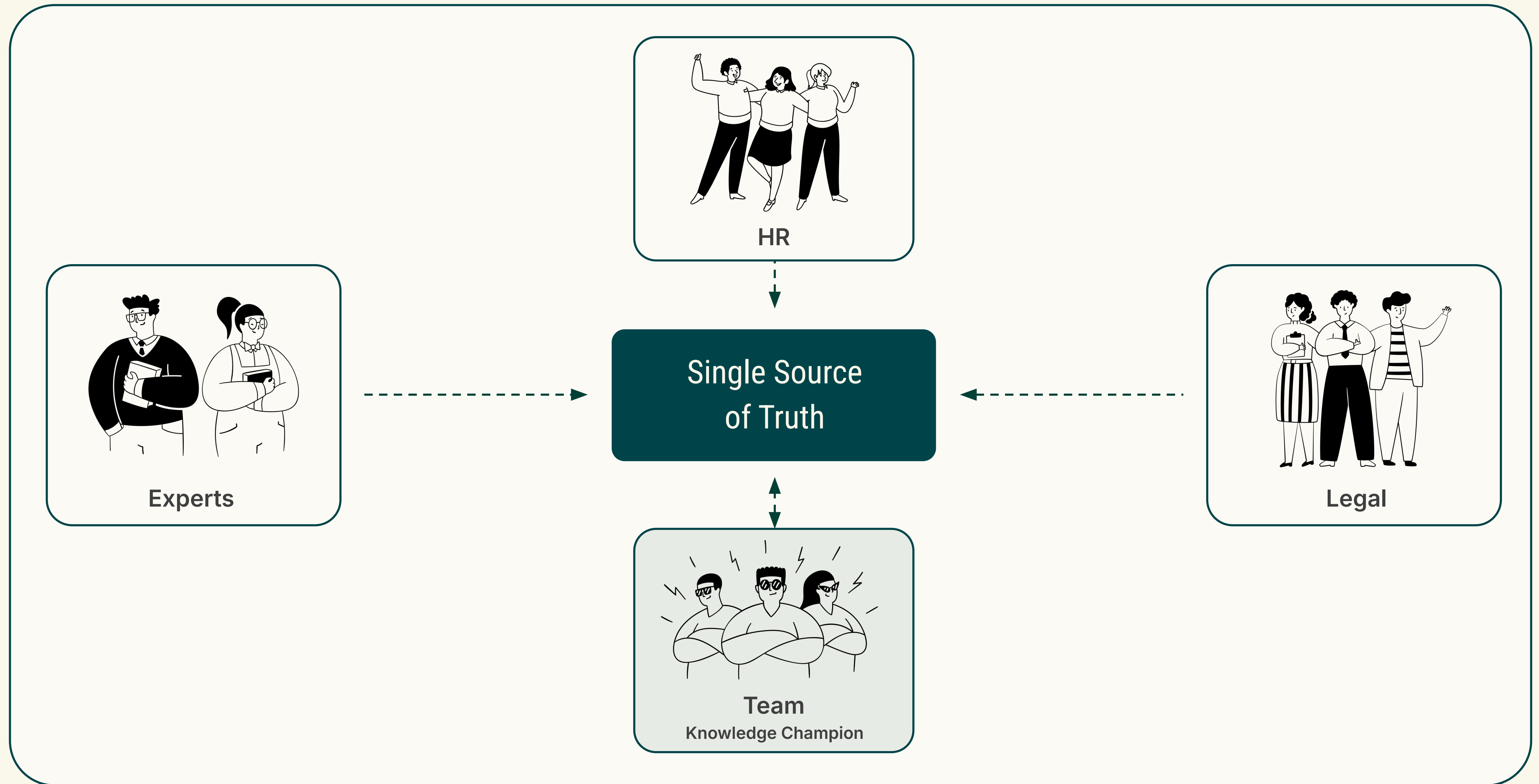
# Decentralized Authoring

# How do you staff this?

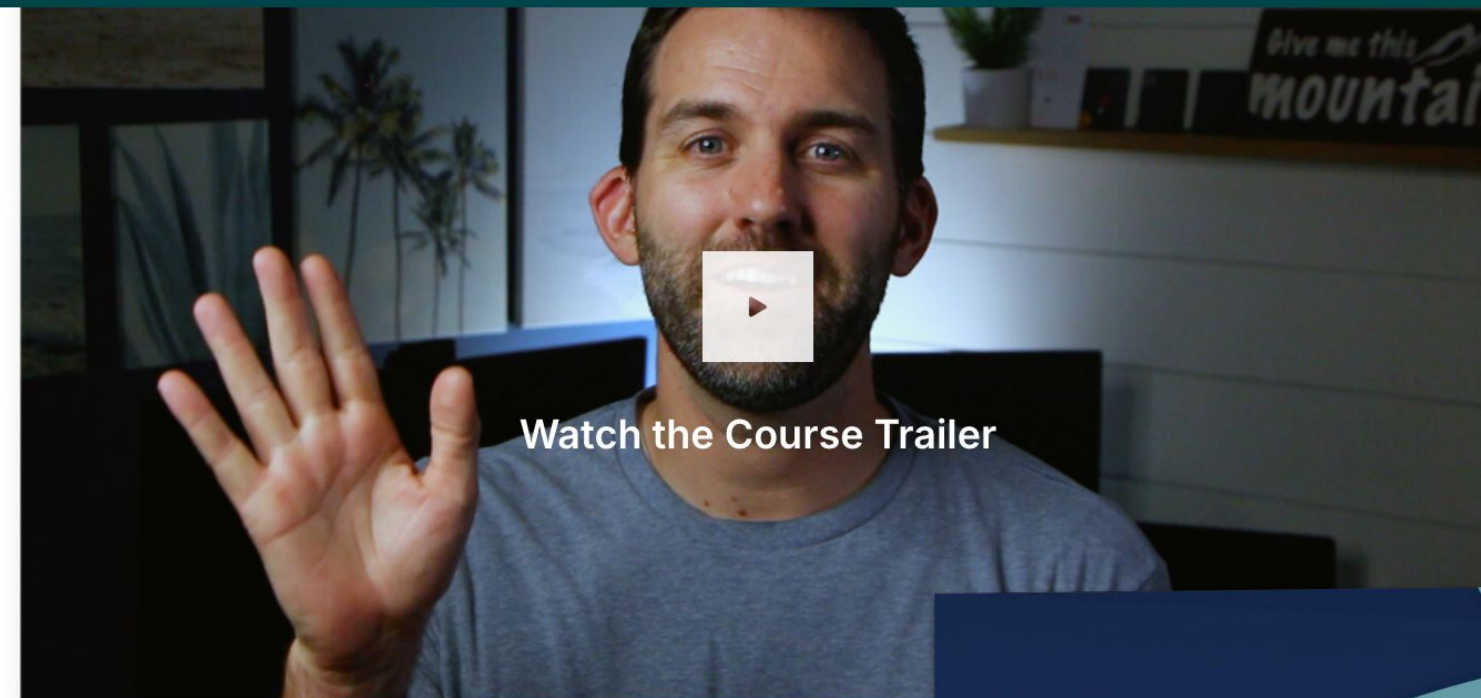**1** The Knowledge Champions already exist → They create the stop gaps

**2** The Knowledge Ops Coach can be someone from L&D or Knowledge Management who wants to empower others
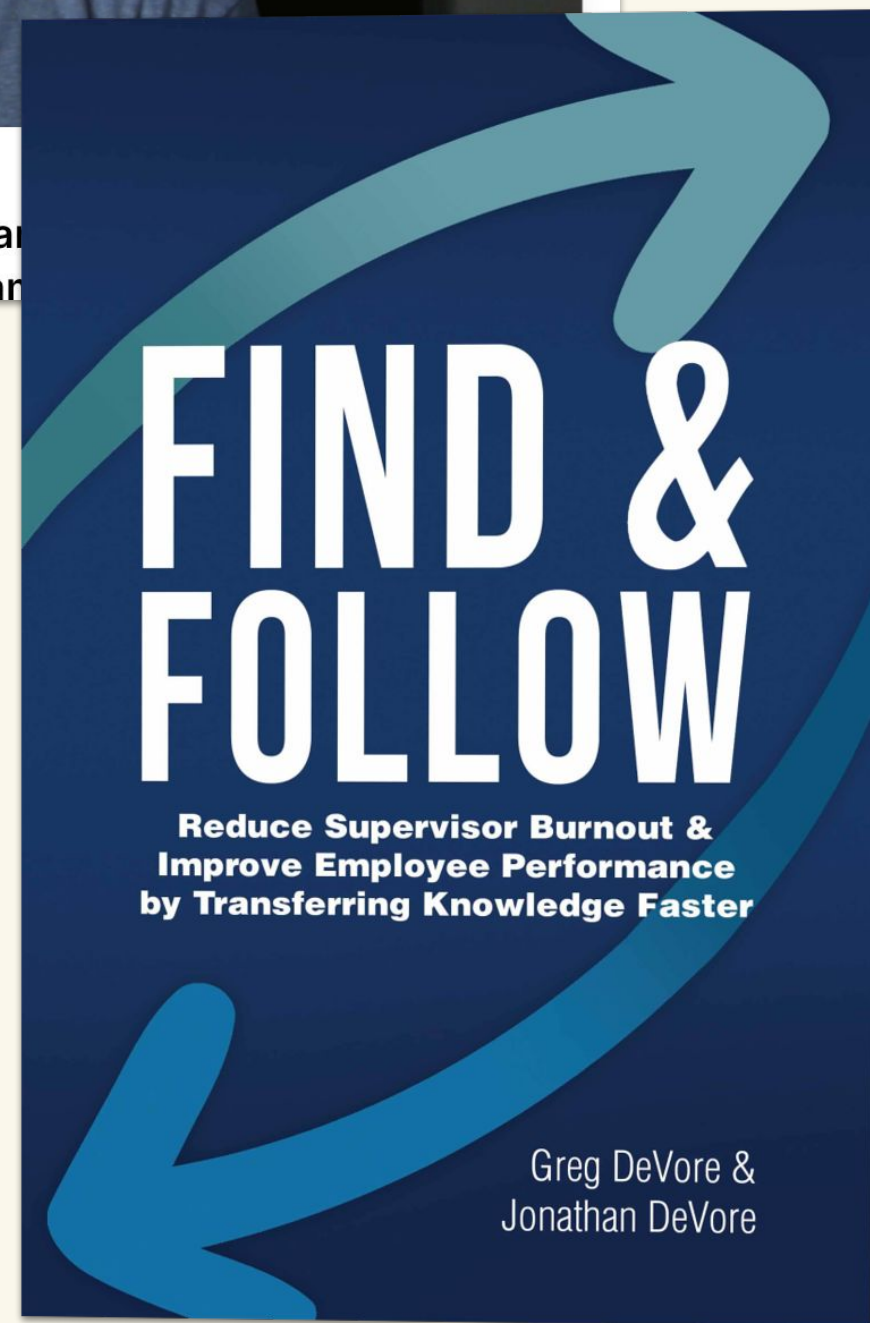
# Next Steps

**Find & Follow 101**

This free 30-minute course includes everything you need to know to get started with the Find & Follow Framework
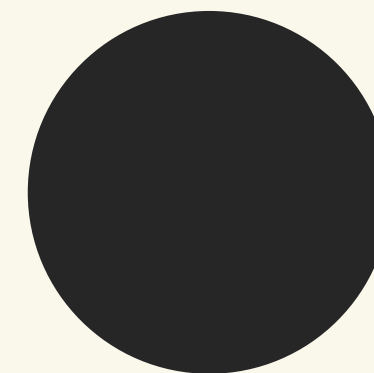
**Enroll for Free Now**

Watch the Course Trailer

## FIND & FOLLOW

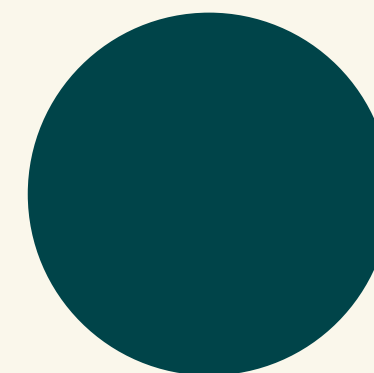Reduce Supervisor Burnout & Improve Employee Performance by Transferring Knowledge Faster

Greg DeVore & Jonathan DeVore

**Find & Follow Course**

https://www.screensteps.com/find-follow-course

**Pick up the book**

https://www.screensteps.com/find-follow-book