# Building a Knowledge-based Corporate Culture to Enhance the Customer Experience

Scott DeLoach – scott@clickstart.net

Click**Start** – www.clickstart.net

A company's most valued asset is the knowledge and skills of its employees. In most companies, this information is "trapped" inside each employee. It's not shared, enhanced, or often even recognized as valuable. In some companies, knowledge is archived in unorganized information silos. It's rarely used or maintained and becomes more of a burden than a benefit. In successful companies, knowledge is mined and developed, the contributors are recognized as valuable, and the knowledge curators build the foundation of the overall customer experience.

In this presentation, I will discuss how to:

- Mine existing enterprise knowledge, and the five key considerations
- Develop knowledge contributors
- Curate content
- Moderate and governing content

We will also explore examples and discuss key features in MadCap Flare and Central that can help you establish a knowledge-based culture within your company and deliver a world-class customer experience.

# Overview

#### Why?

- Standards
- Innovation

#### ISO 9001 Quality management systems — Requirements

First published in 1987

#### 7.1.6 Organizational knowledge

"The organization shall determine the knowledge necessary for the operation of its process achieve conformity of products and services. This knowledge shall be maintained and be made available to the extent necessary."

#### A.7 Organizational knowledge

Requirements regarding organizational knowledge were introduced for the purpose of:

- safeguarding the organization from loss of knowledge, e.g.
- through staff turnover;
- failure to capture and share information;
- encouraging the organization to acquire knowledge, e.g.
- learning from experience;
- mentoring;
- benchmarking.

#### ISO 30401 Knowledge management systems — Requirements

#### First published in 2018

"The purpose of this standard is to support organizations to develop a management system that effectively promotes and enables value-creation through knowledge. Knowledge management is a discipline focused on ways that organizations create and use knowledge."

### Innovation

"In the knowledge-creating company, inventing new knowledge is not a specialized activity—the province of the R&D department or marketing or strategic planning. It is a way of behaving, indeed a way of being, in which everyone is a knowledge worker—that is to say, an entrepreneur."

- Nonaka

#### Challenges

#### "Wicked problem"

 "About 85 percent of our information, document, and knowledge repository are 'ROT' (Random, Obsolete, and Trivial)"

- Arroway, 2019

- "Knowledge is power" mindset
- Inadequate understanding of knowledge management and its benefits
- Privacy concerns
- Resources and cost

#### Goals

- Know what information exists
- Know what information is needed
- Know what the team members know and identify gaps
- Develop a coordinated plan for capturing, distributing, and managing knowledge
- Create a one-stop shop everything accessible and ideally searchable from one place.

# Mining enterprise content

## What is content mining?

- Part of a knowledge resource audit
- Audit: gather and inventory existing knowledge
- Mine: transform, assimilate, chunk, collate, distill content

## What are we seeking?

Documentation: internal and external

- Learning materials
- Communications
- Code
- Ideas
- Knowledge sources: systems and people

# Conducting a knowledge resource audit

#### Identify

- Needs
- What exists (and if it's up to date)
- What does not exist

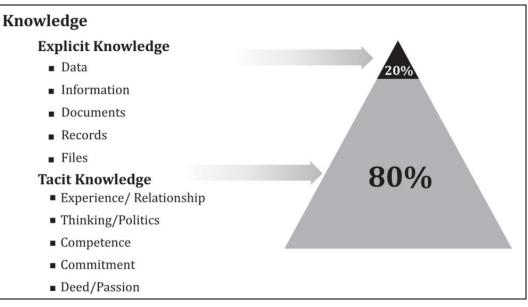
#### Interview

- Where do you go to find information?
- What knowledge is needed to do your job?
- Who asks you what type of questions?

# **Considerations**

- Complexity
- Freshness
- Frequency of use
- Current format
- Reuse

# Complexity



- Anyacho 2021

#### Converting "know how" to "how to"

- Number of steps and/or supporting elements (images, videos, etc)
- Interdependence
- Regulations
- Danger/risk
- Frequency of change

## Freshness

- Product lifecycle
- Date created
- Date modified

#### Frequency of use

- How often the information is used
- How often it should be used
- Regulations for use/training

# **Current format**

- Import?
- Add?
- Link?

#### Reuse

- Snippets and variables: Suggestion and frequent segment reports
- Project Linking
- External Resources
- Central: import

# Developing contributors

# Why?

- Engagement
- Improve the contributor and author experience

#### How?

Reduce barriers to contribute (links in topics, templates, email addresses)

- Open collaboration
- Incentives
- Embed into corporate culture

# Reducing barriers to contribute

- Feedback
- "Submit content"

# **Feedback links**

G Unity Documentation	Manual <u>Scripting API</u> Search scripting <b>Q</b> unity.com →
Version: 2022.3-	Cr
Scripting API	Welcome to the Unity Scripting Reference!
UnityEngine     UnityEditor	This section of the documentation contains details of the scripting API that Unity provides. To use this information, you should be familiar with the basic theory and practice of scripting in Unity which is explained in the <u>Scripting section</u> of our manual. The scripting reference is organised according to the classes available to scripts which are described along with their methods, properties and any other information relevant to their
<ul> <li>Unity</li> <li>Other</li> </ul>	The scripping reference is organised according to the classes available to scripts which are described along with their methods, properties and any other minormation relevant to their use. Use. The pages are extensively furnished with example code ('examples'); notwithstanding anything in the Terms of Service® to the contrary. Unity grants you a non-exclusive, non-
	transferable, non-sublicensable, royalty-free license to access, to use, to modify, and to distribute the examples without crediting Unity.
	API are grouped by namespaces they belong to, and can be selected from the sidebar to the left. For most users, the UnityEngine section will be the main port of call.
	Did you find this page useful? Please give it a rating:
	Report a problem on this page
	Is something described here not working as you expect it to? It might be a Known Issue. Please check with the Issue Tracker at Issuetracker.unity3d.com 2.
	Copyright @2023 Unity Technologies. Publication Date: 2023-07-07.
•	Tutorials Community Answers Knowledge Base Forums Asset Store Terms of use

# **Open collaboration**

- Crowdsourcing (wiki model)
- "Editathon"

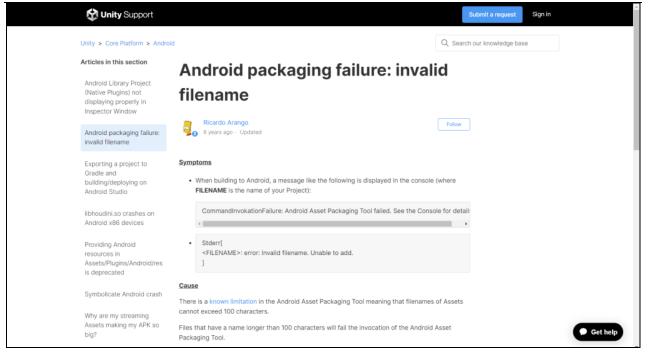
# **Open collaboration - how?**

- Wiki https://en.wikipedia.org/wiki/Wikipedia:How\_to\_run\_an\_edit-a-thon
- Google Docs
- Word 365 shared document
- MadCap Central and MadCap Contributor

### Incentives

- Attribution
- Recognize top contributors
- Mentoring opportunity
- Contests
- Bonuses

#### Attribution



#### **Recognizing top contributors**

ConocoPhillips Archimedes (now Spirit of Performance) awards:

- "Give" award for the person or team who shared the knowledge of greatest value to others
- "Grab" award for the person or team who generated the most value through re-using knowledge from elsewhere
- "Gather" award for the community of practice that has generated the most value through knowledge sharing
- "Guts" award for the person or team that has shown the most courage in sharing lessons from failure

In 2013, 33 winners contributed more than \$700 million in documented business value, as well as a significant health, safety and environmental impact.

#### Embedding into corporate culture

- Team member profiles
- Job descriptions
- Performance reviews

# Challenges

- Fear of asking questions & imposter syndrome
- Fear of being incorrect

### Solutions

- KM certification
- Use built-in learning features like quizzes and LMS integration
- Goal setting
- Not "write down everything you know" instead "write down (or provide references to) everything you wish other people knew"

# **Curating content**

# Adapting content to users

- Focus on what's important
- Why?
- When?
- Scenarios
- Leverage external sources

## Adapting content for reuse

- Content management
- Snippets and variables
- Micro content

## Adapting content for reuse

- Use
- Printing
- Copying & pasting
- Linking
- Embedding

# Aligning with corporate objectives

- Capturing and disseminating best practices
- Increasing operational efficiencies
- Saving money

- Reducing onboarding time
- Avoiding risk

Stay focused on project goals and avoid scope creep

# Moderating & governing

# Tracking content

- Reviewers/"owners"
- Laws and regulations
- Last modified/last reviewed and review schedules

ISO 30401 covers how to handle outdated and invalid knowledge

## **Requirements for success**

- Teams must commit to providing reviewers/owners
- Regulatory/legal team must commit to reviewing content
- "Incentivize knowledge seeking, and sharing will follow."
   Lambe & Milton

# **Evaluating & improving**

#### Challenges

- Dunning-Kruger effect
- No knowledge of what "good" is

#### Solutions

- External audit
- Peers: LinkedIn, slack, professional societies, MadCap's customer showcase
- Education: webinars, MadWorld, and other conferences

## Resources

- Anyacho, Benjamin C. 2021. The Knowledge Café: Create an Environment for Successful Knowledge Management. Oakland: Berrett-Koehler Publishers.
- Arroway, J. 2019. Setting the stage for knowledge management. AASHTO Spring Administrative Conference (May), Baltimore, MD.
- Collison, C., and Geoff Parcel. 2005. Knowledge Management. Brno: Computer Press.
- Dyer, G., and McDonough, B. 2001. The state of KM. Knowledge Management (May), 31–36.

- Garfield, S. Lucidea's Lens: Special Librarians & Information Specialists The Five Cs of KM. Richmond: Lucidea Press.
- How to run an edit-a-thon. https://en.wikipedia.org/wiki/Wikipedia:How\_to\_run\_an\_edit-a-thon
- ISO 9001. https://www.iso.org/obp/ui/#iso:std:iso:9001:ed-5:v1:en
- ISO 30401. https://www.iso.org/standard/68683.html
- Lambe, Patrick. 2023. Principles of Knowledge Auditing. Cambridge: MIT Press.
- Milton, N. J., and Patrick Lambe. 2020. The Knowledge Manager's Handbook: A Step-By-Step Guide to Embedding Effective Knowledge Management in Your Organization. London: Kogan Page Limited.
- NASA KM Resources. https://www.nasa.gov/content/knowledge-management-km-resources
- NASA Knowledge Policy for Programs and Projects. https://nodis3.gsfc.nasa.gov/displayDir.cfm?Internal\_ID=N\_PD\_7120\_006A\_
- Nonaka, Ikujiro. 2008. The Knowledge-Creating Company. Boston: Harvard Business Press.

Polanyi, Michael. 1966. The Tacit Dimension. Chicago: The University of Chicago Press.

# About the presenter

Scott DeLoach is the CEO of Click**Start**, an STC Fellow, and an ATD Certified Professional in Talent Development (CPTD). He has over 30 years of experience as a content strategist, technical writer, instructional designer, trainer, and UX architect. At Click**Start**, Scott provides content strategy development, design, consulting, and training services for technical documentation, P&P, knowledgebase, and eLearning projects using MadCap Flare.

You can reach Scott at www.clickstart.net or by email at scott@clickstart.net.

