Find & Follow

General Ideas

- Supervisors in companies are overworked because other employees are not properly trained and rely on the supervisors
- Most companies train through shadowing.
  An untrained employee follows a trained one and learns by watching them
- Shadowing needs a lot of time and misses implicit knowledge that is not transferred
- The problem of employees learning has to be reframed to a knowledge transfer problem
- Employees don't need to memorize all the knowledge.
  They only need to access it, when they need it.
- Teach foundational knowledge and create guides for operational knowledge
- Relying on memorization of knowledge is bad because it increases errors and reduces employee bandwidth
- Even complex processes can be clarified and be described

Knowledge Definitions

Foundational Knowledge:	Background information one needs to understand a guide.
Actionable Knowledge:	Company specific knowledge to do a task.
Tribal Knowledge	• In people's heads, emails, or chats. • Undocumented. • Person-dependent.
Digital Guides:	• Interactive step-by-step guides with decision trees or clickable sections.

Operational Knowledge:	Knowledge an employee needs, to complete a task

Knowledge Ops Maturity Model
- A model to check where your company is at and where it has to focus

Tribal	Document	Guide	Train	Accelerate
• No Documentation at all • Training through shadowing • Constant supervisor interception • No centralized location for information	• Little documentation • Not used • People relying on memory to work	• Digital guides exist • People work with guides	• Guides used in training • Training through practice with guides	• Optimization of processes

The 4 Systems
- A system for implementing find and follow

Prepare	Train	Empower	Adapt

• Building a foundation of digital guides	• Break work into simple topics
	• Create training for foundational knowledge
	   • Max. 10-30min of content each
	   • Record videos for recurring training sessions
	
	• Train employees with practice of the content
	   • 80-90% of the training should be practice
	   • Success is an employee being able to use a guide without help
	
	• Employees should always use a guide, no matter their experience
	
	• Include:
	   • What
	   • Why
	   • When
	   • Where
	   • **how**
		• Shift the work to rely on digital guides
		• Encourage guides and avoid questions
		• Collect questions and missing knowledge to update the guides
		
		• If an employee doesn't find a guide. They make a note and forward the information to the supervisor.
		• If the supervisor has time, they create a guide right away. If not a note is created.
			• Test the guides
			• Gradually improve the guides
			
			• Highlight the changes in the guides

Prepare (continued):

Align & Define:	• Teach people about the idea • Get everyone on the same page • Hold Find & Follow Workshops, where you teach employees and define the knowledge to be created • Create a Find & Follow Report to sort out the needed knowledge
Design & Refine:	• Create digital guides • Make them findable, followable and scannable • **Findable:** They find it, when needed • **Followable:** One can follow it without help • **Scannable:** One can adjust the level of detail as needed

- Choose a title that hints at a task or problem ("Hot to…")
  Avoid jargon
- Create small documents for each task. No long documents with collections of information
- Map out the processes in the organization
- Each time a process crosses a swim lane, create a guide
- Break up longer tasks into steps
- A guide should cover all variables an employee encounters with different solutions

- Create **decision trees** for all "If.. Then…" encounters
- Use **Bullet points** and **screenshots**
- Use **expandable sections** and **headings** so people can scan it
- Use **Checklists**
- Include Links to sub-sections and foundational knowledge
- Start with the 20% of the tasks that cause 80% of the problems

Knowledge Ops Teams
= a team to implement Find & Follow

- All people responsible for training others
- People with experience in their role
- Compliance officers to ensure the rules are kept
- Documentation specialists to help with the guides

- Seasoned employees create guides instead of helping directly
- Supervisors focus on only coaching, no helping
- Senior management coordinates guides across teams and departments
- Front line employees focus on using guides in their work, not memorizing

Knowledge Champion:	One per team
	   • Creates/maintains guides
	   • identifies gaps

Find & Follow Coaches:	• Lead Find & Follow Workshops • Separate foundational and actionable knowledge • Create guides • Train employees
Knowledge Ops Manager	A person coordinating knowledge champions across teams

Find & Follow Report
- A table to clarify what to put into the guides

- Things to consider

Tasks:	The tasks a role performs (e.g. canceling an account)
Requests:	What others requests from the role (e.g. reports)
Problems:	Any problem the role should solve
Questions	Any questions the employee should be able to answer

Topic Areas	Activities	Related Sub-Tasks	Variables	Concepts
• Broad categories of activities • e.g. software, transaction types, reason codes, or customer segments.	• Main actions within each topic area • e.g. handling inquiries, processing transactions.	• Smaller steps of each activity • e.g. finding accounts, reviewing history, or identifying issues	• Factors that affect how an activity is done • e.g. customer type, data access, or policies.	• Concepts one needs to understand • Foundational knowledge • e.g. processes, industry terms, tools.