Document Types

Exploratory Study - Research Findings

Research Goal

How SMEs learn and share knowledge?

1 How do SMEs learn in 5 moments of needs and what content types are used?

2 What are their preferences and frustrations about current Knowledge sharing tools?

3 What are the main motivators, pain points and fears about sharing knowledge with colleagues?
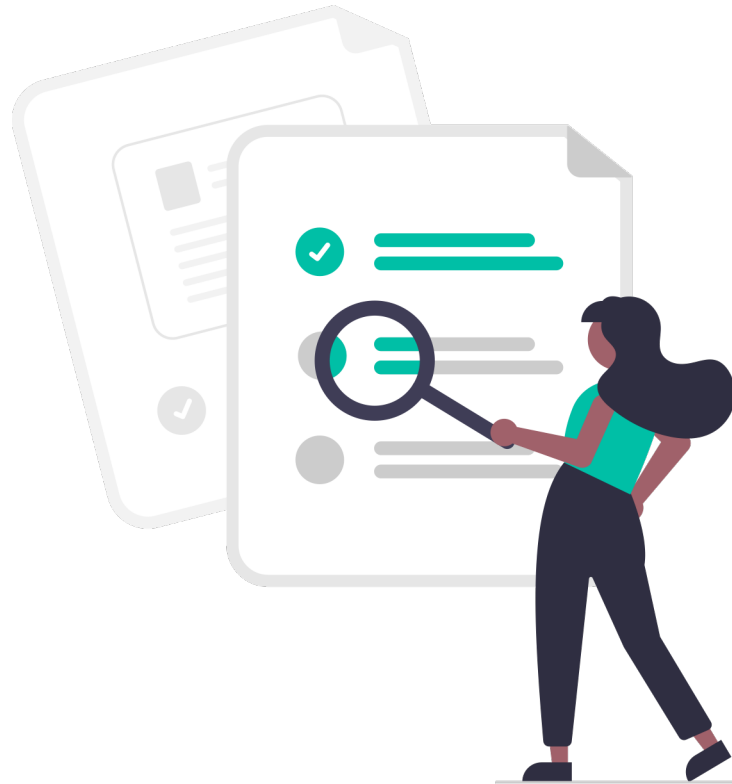
Participants

- Product Manager
- eCommerce Engineer
- Digital Marketeer
- Technical Support
- Call center Exec
- Researcher
- Delivery manager
- Analytics Consultant
- Technical writer
- Software Architect
- Business Analyst

Research Methods

- Interviews
- Surveys
- Secondary data

Data

Research

SME - Interview Questionnaire Screener

Research Goal:

-       To understand the motivations, behaviours and pain-points of SMEs(Subject Matter Experts) or Employees towards sharing knowledge with their peers
-       To identify the strengths and weaknesses of the knowledge management tools they use to manage informal knowledge sharing within their teams.

Questions

Section1: About the SME and their job
1.   Tell us briefly about what you do - your role, goals, your typical work week etc

2.   What part of [the job] do you most enjoy? What do you least enjoy?

3.   Lets say, you are really good at a particular task and your Manager/ Boss tasks you to share some of the best practices or tricks with rest of the team.

     1.   What would be your main motivation to share this knowledge

     2.   What are some of your fears or painpoints not to share knowledge with your team members

Section2: About learning and knowledge sharing in team
1) When a new team member joins your team, how is he/she onboarded onto projects?
Ex: What sort of information is given to them to orient them? What are the various documents your team must have created to help them get to pace?

SME Interview - Responses

Research Goal:

- To understand the motivations, behaviours and pain-points of SMEs(Subject Matter Experts) or Employees towards sharing knowledge with their peers
- To identify the strengths and weaknesses of the knowledge management tools they use to manage informal knowledge sharing within their teams.

Questions

Section1: About the SME and their job

1. Tell us briefly about what you do - your role, goals, your typical work week etc
   ➢ My role has two main components: conducting on-demand research for internal business initiatives, and managing enterprise-wide resources such as Lynda.com, Harvard ManageMentor, etc. A typical work week will be split fairly equally between these two broad responsibilities.
2. What part of [the job] do you most enjoy? What do you least enjoy?
   ➢ One of my favorite parts is diving into an interesting new research question – learning about a new topic (and having the time to do so) is a pleasure. My least favorite part is being pulled unexpectedly into time-sensitive on-demand metrics and analytics needs.
3. Lets say you are really good at a particular task and your Manager/Boss tasks you to share some of the best practices or tricks with rest of the team.
   i. What would be your main motivation to share this knowledge
      ➢ To me, there is intrinsic value in sharing knowledge – a more informed workplace is a stronger workplace. And I've leveraged others' knowledge enough that I want to repay the favour.
   ii. What are some of your fears or painpoints not to share knowledge with your team members
      ➢ None, except the struggle to prioritize knowledge sharing among all the other competing priorities.

Section2: About learning and knowledge sharing in team
1) When a new team member joins your team, how is he/she onboarded onto projects?
Ex: What sort of information is given to them to orient them? What are the various documents your team must have created to help them get to pace?
   ➢ Typically via a series of scheduled phone calls, and sharing any related information via email.

Data Consolidation – Analysis Tracker

	A	B	C	D	E
1	About learning and knowledge s	NEW	APPLY & SOLVE	MORE	CHANGE
2					
3	Participant	When a new team member joins your team, how are they onboarded onto projects?	it? If you are able to find an answer, how would you go about sharing it with	skills on the existing job, how do you go about it?	change in methods, techniques, processes) which requ
4	Digital Marketeer	Onboarding - 1-1 on every tool, every unit, every vertical, organization, writing, standards, marketing aspects, structures of marketing, how we operate, naming conventions, saving conventions, policies of usage of assets, timelines, timesheets, regular policies, PoCs, whos is who, sample work is given to understand the suitability, templates 15 days - one or two training every day Repository	Center of Excellence Ex: data management - ask the experts, superiors, stakeholders - seek more clarity - gather all the information and then structure it Research on Google Ex: Case study - read the products, read the competitor's products, read the technical aspect	I pick up something that is not my responsibility I ask my colleagues to teach me, to give me basic knowledge on something new	Training Repeated practise Go straight into work - training material, people, research, n mistakes and learn, others' learing, fellow resource.
5	Researcher	Typically via a series of scheduled phone calls, and sharing any related information via email.	This question is a little vague as far as "job-related issue". I'm not sure I can answer this one as written.	I typically have a conversation with my manager, and also leverage a lot of the self-guided resources that we have available (many of which we manage!). That's my typical go-to strategy.	Same as earlier response.
6	Technical Information Engineer	We don't have classroom trainings for new hires Documentation is done confluence wiki so one of the spaces in wiki has new hire documentation After going thru the reading material and videos on it, they have a test in the L and D portal This is almost for a month So the material contains info abt setting up a space, the authoring process on wiki, how to share doc for reviews, publishing it to customers, preparing for translation Each section/ task contains info abt the access level needed for performing the task Then there are standards like writing std (Info elements), naming stds and so on Info abt additional tools for videos, scripts etc	New hires are assigned mentors who help them with any queries Mentors help with project specific info This is for 3 months Then the mentorship is officially over but they can continue to coach the new hire or be the contact for any queries New hires or tenured ones continue to use wiki to refer to any changes in the process etc So we can comment on the pages with any queries There is a team that usually monitors it and they ans the query Others are free to ans or discuss too I watch the space even though I am not in that team We use flow dock which is similar to yammer or chatter to discuss things	Research and share best practices in KM sessions. We have a dedicated KM space where we keep curating useful resources and also the presentations from these KM sessions are added to the space	We jump in and learn. On-the-job learning with little guidan from seniors or peers. Plus, guidelines and sample content pieces to tell us about the expected tone, look and feel, publishing terms etc
7	Product Manager	A senior member of the team will draft a plan for KT. Ideally it takes 2 months for this process . Meanwhile the candidate will also be involved in smallest assignments. We have all the documents on Google drive now. Otherwise the documents would be either on confluence or SharePoint. We will have technical documents and functional documents of the product. Depending on the profile these docs will be shared. Architecture Specifications of various features of products Environment details: server details, repositories, tool details, code Project related information - previous reports, Issues, presentations Point of contacts : Who knows what? Internal resource pools Solution documents Requirement documents Architecture documents POCs Access details, User account details Training documents - implementation - step by step procedures	We take help of our peers. If not, any SME on the floor in that topic. Solutions normally will be published to the team over email.	It is mostly self learning From the peers who are SME's in the particular area From research on similar topics From the tech talks on the similar topics	My first preference would be to learn the new skills on jo getting into the project where this opportunity exists and become part of my work. This helps me to get my hands dirty at early stage thus helps me learn faster.
8	Oracle Architect	New team member will be allocated the recent pending work and he can then ask for support in any matter and will be supported by one of the members. Each piece of work will mostly have a certain step by step document. So new member wil be given the sharepoint/confluence link to such documentation. If he/she has any doubts they can contact any or all members of the team.	Generally if it is oracle daily support related issues, we have a common spreadsheet with list of issues and fixes, so we refer to that. If it is new we have to explore the code/config and also search in oracle support discussion groups for a related issue.	From the peers who are SME's in the particular area	

SME Responses – Analysis & Coding using Affinity Mapping

	A	B	C
1	NEW - How do you learn for the first time?		
2			
3	How do you learn?	What is covered? CONTENT TYPES	
4			
5	1-1 sessions, KTs with seniors	Procedural - Instructions, Step-by-step procedures, Troubleshooting, How tos, Processes	
6		Functional	ESCALATION PROCEDURES
7		Technical	TROUBLESHOOTING (ERROR RESOLUTION-PROBLEM, FIX, ACCEPTANCE CRITERIA)
8			CUSTOMER SCENARIOS - HOW TOS, FIXES
9			HOW TOS - TOOLS
10			HOW TOS - VARIOUS TASKS (EX: SETTING UP, SHARING, PUBLISHING ETC.)
11			STEP-BY-STEP IMPLEMENTATION PROCEDURE
12			
13	On-the-job Learning	Referential - Principles, Guidelines, Tips, Checklists	
14		Functional	GUIDELINES
15			STANDARDS/CONVENTIONS
16			DOS & DONTS (EX: CLIENT INTERACTIONS)
17			POINT OF CONTACTS (WHO'S WHO)
18			POLICIES
19			REPORTS (PROPOSALS, MARKET RESEARCH)
20			SAMPLES (Ex: Writing samples)
21			LINKS TO DOCUMENTS
22			PRODUCT / COMPONENT RELATED INFORMATION
23			LOCATION OF REPOSITORIES
24			PROCESS (SALES STRUCTURE)
25		Technical	PROCESS FLOWS
26			ARCHITECTURAL DIAGRAMS
27			CLASS DIAGRAMS
28			REPORTS (Ex: SYSTEM PERFORMANCE/DASHBOARD/ANALYTICS)

Data Findings

How do SMEs learn during 5 moments of need - what are the various approaches and content types used?

Learning Moment: NEW

Here are few top approaches adopted when learning for the first time.

1 to 1 sessions

Procedural information is covered - Instructions, Step-by-step procedures, Troubleshooting, How tos, Processes

Classroom Training

Conceptual information is covered - Facts, Definitions, Fundamentals

On-the-Job Learning

Referential/Contextual information is covered - Principles, Guidelines, Tips, Checklists

1 to 1 sessions/KTs

Procedural information is covered
- Instructions, Step-by-step procedures,
Troubleshooting, How tos, Processes

What is covered? CONTENT TYPES	
Procedural - Instructions, Step-by-step procedures, Troubleshooting, How tos, Processes	
Functional	ESCALATION PROCEDURES
Technical	TROUBLESHOOTING (ERROR RESOLUTION-PROBLEM, FIX, ACCEPTANCE CRITERIA)
	CUSTOMER SCENARIOS - HOW TOS, FIXES
	HOW TOS - TOOLS
	HOW TOS - VARIOUS TASKS (EX: SETTING UP, SHARING, PUBLISHING ETC.)
	STEP-BY-STEP IMPLEMENTATION PROCEDURE

On-the-Job Learning

Referential/Contextual information is covered - Principles, Guidelines, Tips, Checklists

What is covered? CONTENT TYPES	
Referential - Principles, Guidelines, Tips, Checklists	
Functional	GUIDELINES
	STANDARDS/CONVENTIONS
	DOS & DONTS (EX: CLIENT INTERACTIONS)
	POINT OF CONTACTS (WHO'S WHO)
	POLICIES
	REPORTS (PROPOSALS, MARKET RESEARCH)
	SAMPLES (Ex: Writing samples)
	LINKS TO DOCUMENTS
	PRODUCT / COMPONENT RELATED INFORMATION
	LOCATION OF REPOSITORIES
	PROCESS (SALES STRUCTURE)
Technical	PROCESS FLOWS
	ARCHITECTURAL DIAGRAMS
	CLASS DIAGRAMS
	REPORTS (Ex: SYSTEM PERFORMANCE/DASHBOARD/ANALYTICS)
	SAMPLES (Ex: Code)
	APIs
	ACCESS DETAILS (ACCOUNTS, SERVERS, ENV. DETAILS)

Classroom Training

Conceptual information is covered - Facts, Definitions, Fundamentals

Conceptual - Facts, Definitions, Fundamentals	
Functional	PRODUCT INFORMATION
	CLIENT HISTORY
	PROJECT GOALS/DETAILS
	ORGANIZATION INFORMATION (BUSINESS UNITS)
	FUNDAMENTALS
Technical	TOOL INFORMATION

Field Research

What SMEs create	How SMEs create
Access and Environment: Environment details, server details, repositories, tool details	
Tips, Cheat sheets, Checklists, Glossary, Short cuts, Point of contacts	Lists, Posters, Infographics
Coding practices, Product Information, Business domain fundamentals, Project summaries, Project related information - previous reports, Issues, presentations	Blogs
FAQs, How tos	Q & A templates
Quick start guides, Training content, Product guides, Contextual help	Ebooks, Help suites *Step-by-step instructional or training templates*
Scenarios, case studies	Decision trees / tables/ flowcharts

UX Recommendations - DOCUMENT TYPES

Procedures

- How tos
- Step-by-step instructions
- Customer scenarios
- Troubleshooting/ Errors - Fixes
- Audio/Video authoring templates for instructions/talks

Concepts

- Presentations (policies, company, project info)
- Generic blog styled docs with Product/Component fundamentals

Context/Referential

- Guidelines
- Tips
- Dos and Donts
- FAQs
- Point of contacts
- (Experts&Peers Directory/Skill spreadsheet)
- Access Details (user accounts/environment det
- URL Links (of documents and repositories)
- Presentations (Proposals/Findings/Process templates)
- Diagrams (Flow charts, process flows, architectural & class diagrams)
- Samples API/Code snippets

Data
Analysis

Learning Moment:

SOLVE

(When things go wrong)
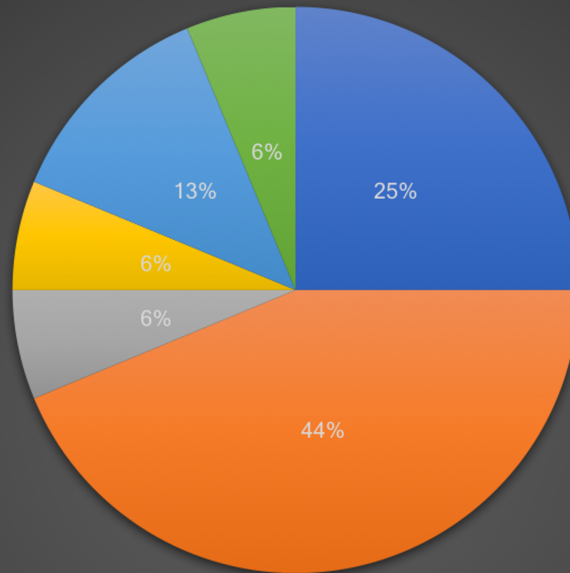
Learning Moment: SOLVE

How do you share the fix/solution you have used to solve the situation?

01 | Email

02 | Update documents in wikis/repositories

03 | Broadcast to the team via messengers like Yammer

04 | Lessons Learnt Meet ups

UX Recommendations - SOLVE

01

Experts/ Peers Directory (or) Skill spreadsheet

02

Email/Messenger integration with the authoring tool and knowledge repository. (Sharing is embedded in the workflow.)

03

PROCEDURAL DOCUMENT TYPES
(How to's, Troubleshooting, Step-by-Step, Scenarios etc)

After Google, asking the experts/peers in the company is the most common approach.Hence, procedural templates along with a referential point of contact will be useful.

Learning Moment:

MORE

(When wanting to learn more)
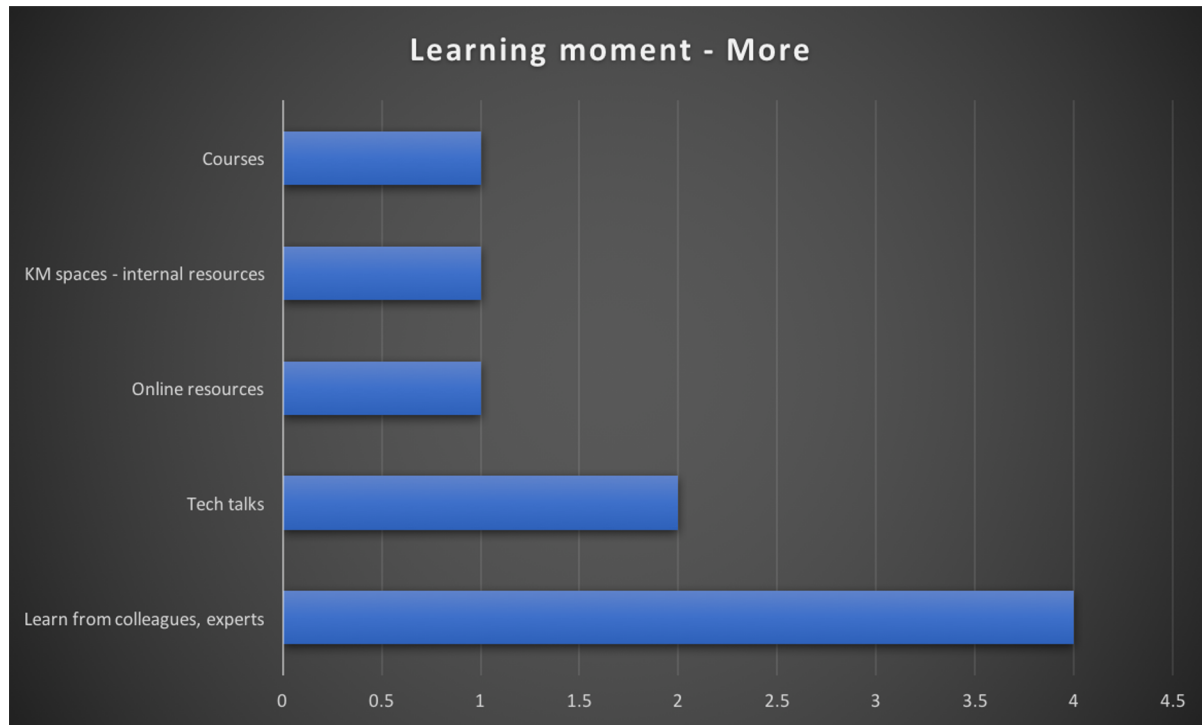
UX Recommendations - MORE

01

Experts/ Peers Directory (or) Skill spreadsheet - (that has – "who- is- good- at- what" and contact details)

02

PROCEDURAL DOCUMENT TYPES

REFERENTIAL DOCUMENT TYPES
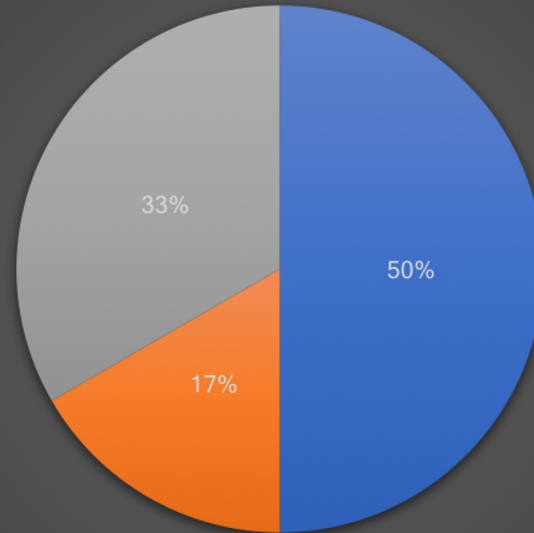
Most common approach is to learn from experts/peers

Learning Moment:

CHANGE

(When things change)

Learning Moment: Change

- On-the-job guidance from an expert — 50%
- On-the-job learning (trial & error) — 17%
- Internal resources - Samples, Guidelines, Expected outcomes — 33%

UX Recommendations - CHANGE

01

Experts/ Peers Directory (or) Skill spreadsheet - (that has who- is- good- at- what and contact details)

02

PROCEDURAL DOCUMENT TYPES

REFERENTIAL DOCUMENT TYPES

Most common approach is to learn from an expert/peer, followed by self-learning by trial & error
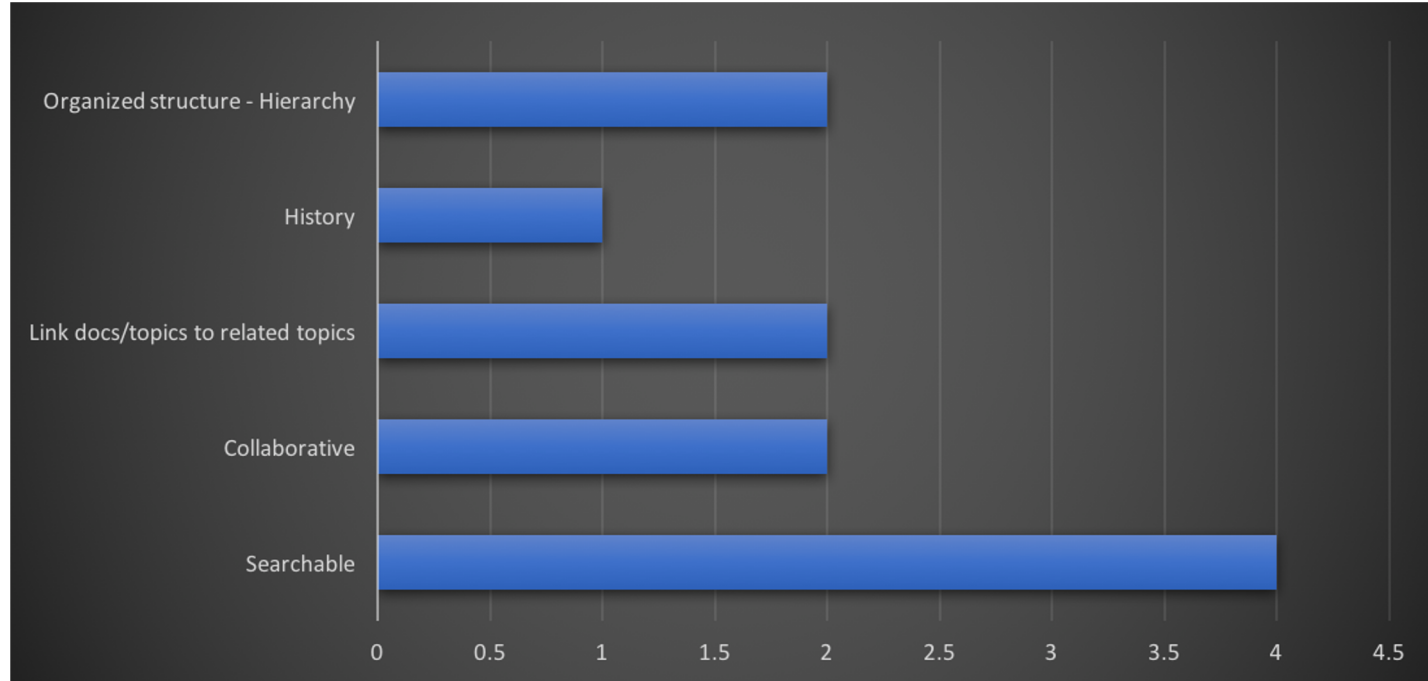
What do SMEs like and dislike in current Knowledge sharing tools?

All of them mentioned KM Tools like Jira, Confluence, Wiki, Atlassian, Box and none referred any of the elearning authoring tools.

WHAT DO YOU LIKE ABOUT A KM TOOL?

UX Recommendations

01

Collaborative

Provide Co-authoring, Co-maintenance, Peer reviewing, version control

03

Searchable

Provide Indexing and organized tree stuctures

02

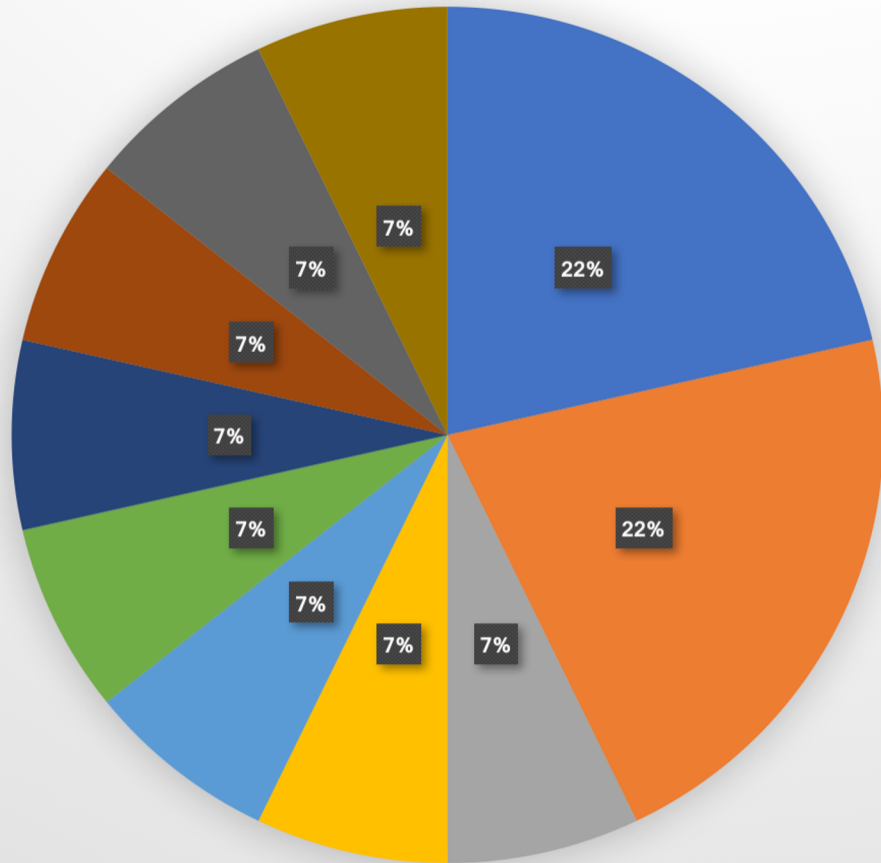**Linking Related Documents**

Provide robust Tagging

WHAT ANNOYS YOU ABOUT A KM TOOL?

Legend:

- Search is not sophisticated enough - Not search friendly — 22%
- Huge volumes of information might bury useful information, Information overload — 22%
- Inefficient indexing — 7%
- No offline capabilities — 7%
- Difficut tagging — 7%
- Mindset/Attitudinal issue of resolving an issue just by consulting peers and not searching properly — 7%
- Updating docs is painful, it is not embedded in the workflow — 7%
- Manual Monitoring of KM spaces (without the flexibility to subscribe for what you really want) — 7%
- No version control — 7%
- Incompatibility with documents like MS word — 7%

UX Recommendations

01

Bad Search

Fix indexing
Enable Search by author, keyword, topic

02

Information overload

Enable Topic level Subscription
Allow Customizable structures - build your own tree

03

Poor Maintenance

Include Version control
Remain Compatible with other file types
Embed it in the flow - for ex: email integration
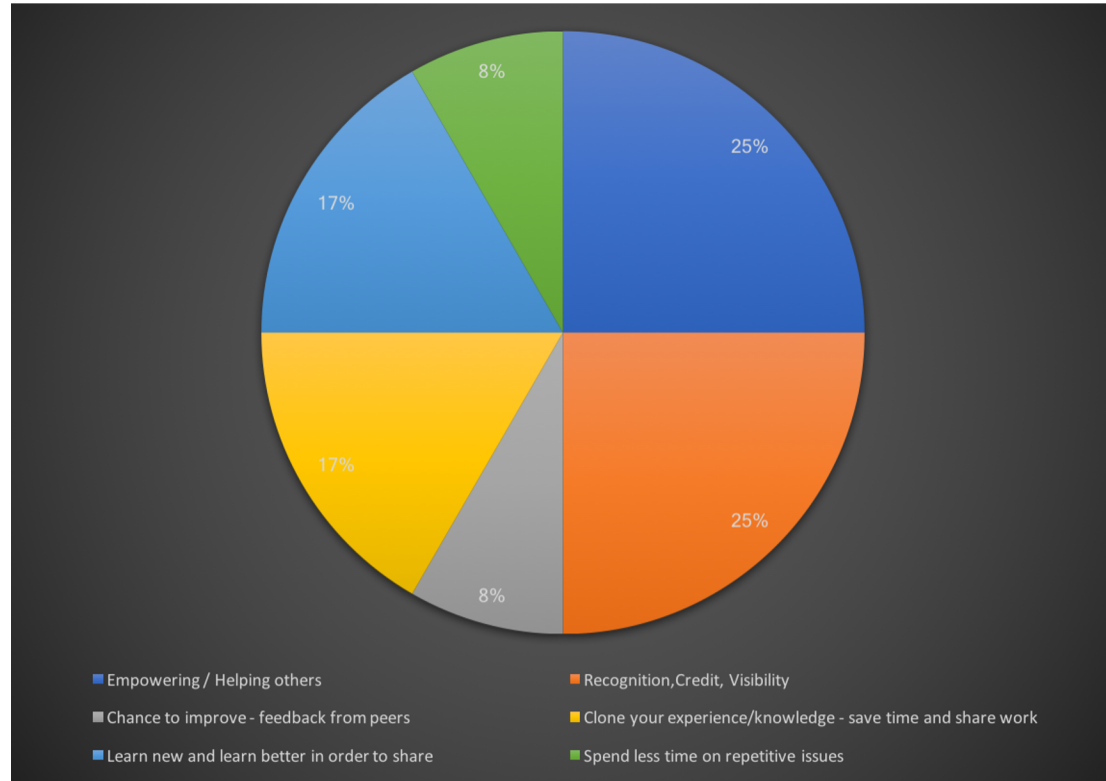
What are the perceptions around knowledge sharing - what motivates SMEs to share knowledge and what are the fears/painpoints NOT to share knowledge?
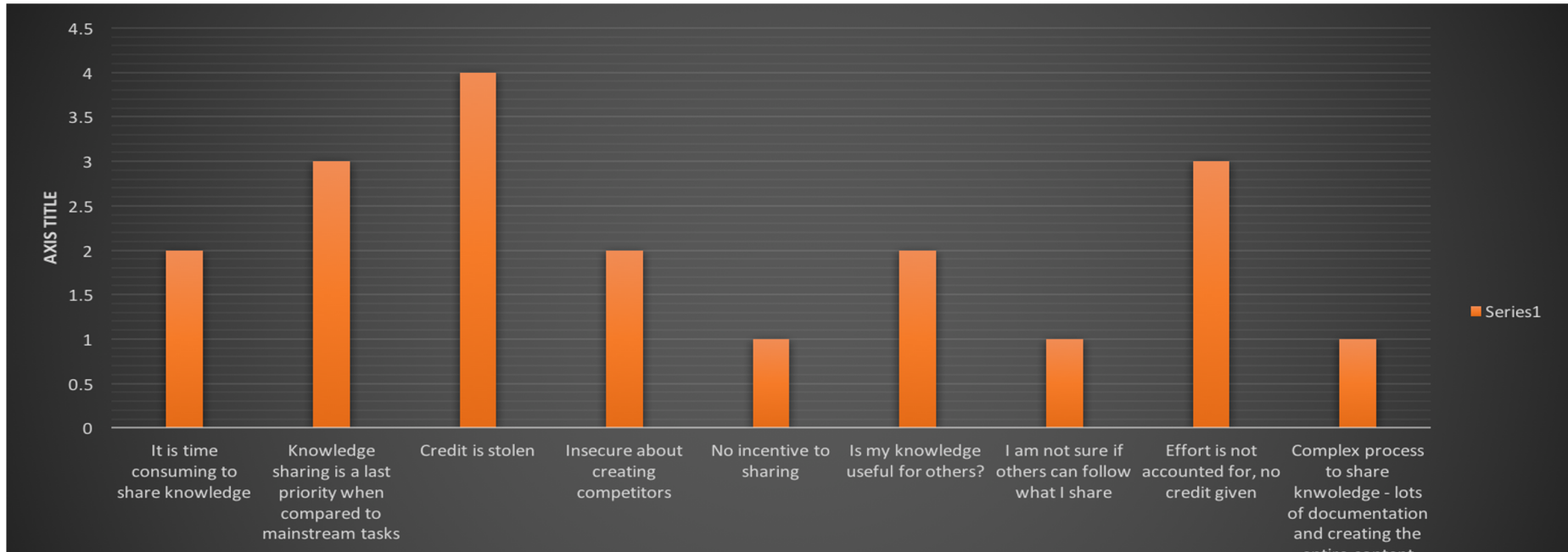
Why do SMEs share Knowledge?

Motivators

Legend:
- Empowering / Helping others
- Recognition, Credit, Visibility
- Chance to improve - feedback from peers
- Clone your experience/knowledge - save time and share work
- Learn new and learn better in order to share
- Spend less time on repetitive issues

Pie chart values: 25%, 25%, 8%, 17%, 17%, 8%

Why DONT SMEs share Knowledge?

UX Recommendations

How can our product address their main motivations and Fears? #BRAINSTORMING

EXAMPLE:

Motivation	Product
Recognition/Credit/Visibility	- Include Author's name (which is already in place?)
	- Display No. of likes, No.of Shares, NPS scores
	- Make it part of annual appraisal

Thank you.