



# 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

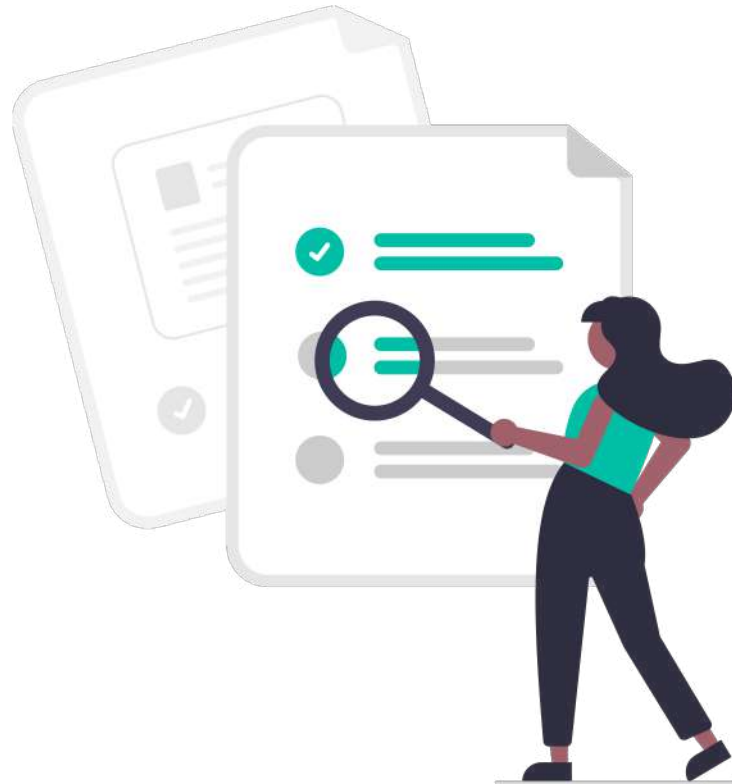
- Product Manager
- eCommerce Engineer
- Digital Marketeer
- Technical Support
- Call center Exec
- Researcher
- Delivery manager
- Analytics Consultant
- Technical writer
- Software Architect
- Business Analyst

# 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. Let's 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 SMFs( 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	NEW	APPLY & SOLVE	MORE	CHANGE
2					
3	Participant	When a new team member joins your team, how are they onboarded onto projects?	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	<p>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</p> <p>15 days - one or two training every day</p> <p>Repository</p>	<p>Center of Excellence</p> <p>Ex: data management - ask the experts, superiors, stakeholders - seek more clarity -gather all the information and then structure it</p> <p>Research on Google</p> <p>Ex: Case study - read the products, read the competitor's products, read the technical aspect</p>	<p>I pick up something that is not my responsibility</p> <p>I ask my colleagues to teach me, to give me basic knowledge on something new</p>	<p>Training</p> <p>Repeated practise</p> <p>Go straight into work - training material, people, research, n mistakes and learn, others' learning, fellow resource.</p>
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	<p>We don't have classroom trainings for new hires</p> <p>Documentation is done confluence wiki so one of the spaces in wiki has new hire documentation</p> <p>After going thru the reading material and videos on it, they have a test in the L and D portal</p> <p>This is almost for a month</p> <p>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</p> <p>Each section/ task contains info abt the access level needed for performing the task</p> <p>Then there are standards like writing std (info elements), naming stds and so on</p> <p>Info abt additional tools for videos, scripts etc</p>	<p>New hires are assigned mentors who help them with any queries</p> <p>Mentors help with project specific info</p> <p>This is for 3 months</p> <p>Then the mentorship is officially over but they can continue to coach the new hire or be the contact for any queries</p> <p>New hires or tenured ones continue to use wiki to refer to any changes in the process etc</p> <p>So we can comment on the pages with any queries</p> <p>There is a team that usually monitors it and they ans the query</p> <p>Others are free to ans or discuss too</p> <p>I watch the space even though I am not in that team</p> <p>We use flow dock which is similar to yammer or chatter to discuss things</p>	<p>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</p>	<p>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</p>
7	Product Manager	<p>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.</p> <p>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.</p> <p>Architecture</p> <p>Specifications of various features of products</p> <p>Environment details: server details, repositories, tool details, code</p> <p>Project related information - previous reports, issues, presentations</p> <p>Point of contacts : Who knows what? Internal resource pools</p> <p>Solution documents</p> <p>Requirement documents</p> <p>Architecture documents</p> <p>POCs</p> <p>Access details. User account details</p> <p>Training documents - implementation -step by step procedures</p>	<p>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.</p>	<p>It is mostly self learning</p> <p>From the peers who are SME's in the particular area</p> <p>From research on similar topics</p> <p>From the tech talks on the similar topics</p>	<p>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.</p>
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 will 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	

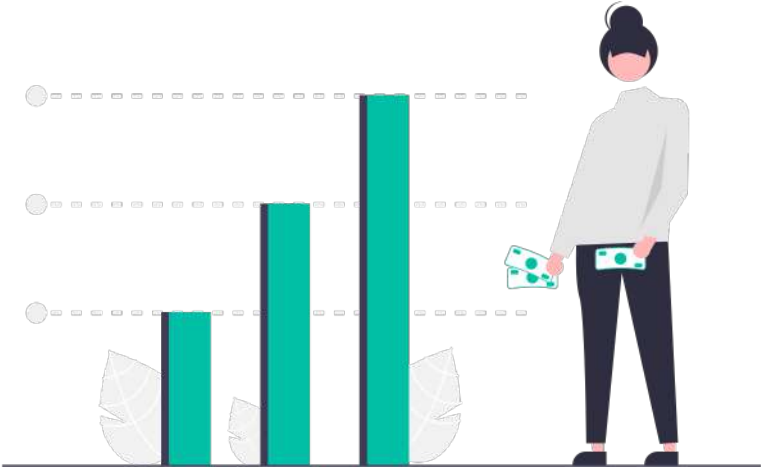
# SME Responses – Analysis & Coding using Affinity Mapping

	A	B	C
1	NEW - How do you learn for the first time?		
2			
3	<b>How do you learn?</b>	<b>What is covered? CONTENT TYPES</b>	
4			
5	<b>1-1 sessions, KT's with seniors</b>	<b>Procedural - Instructions, Step-by-step procedures, Troubleshooting, How tos, Processes</b>	
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	<b>On-the-job Learning</b>	<b>Referential - Principles, Guidelines, Tips, Checklists</b>	
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





In this section

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

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

# Field Research

## Use cases

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 <u>tos</u>	Q & A templates
Quick start guides, Training content, Product guides, Contextual help	<u>Ebooks</u> , Help suites <i>Step-by-step instructional or training templates</i>
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/tasks

## 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 details)
- 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

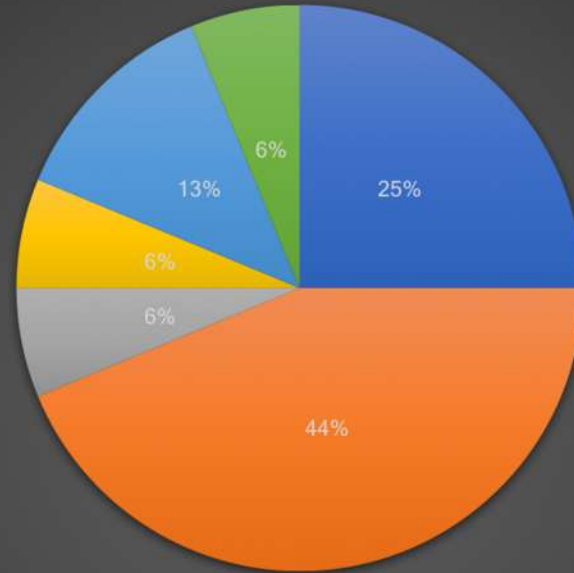


# Learning Moment:

## SOLVE

*(When things go wrong)*

Learning Moment: Solve



- Google for a direction/answers (Stackoverflow, Quora etc)
- Ask the experts/peers in team or company
- Raise in discussion forums
- Check Dashboards
- Check tech documentation and project docs in wiki or repositories
- Discuss in Team meetings

# 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)

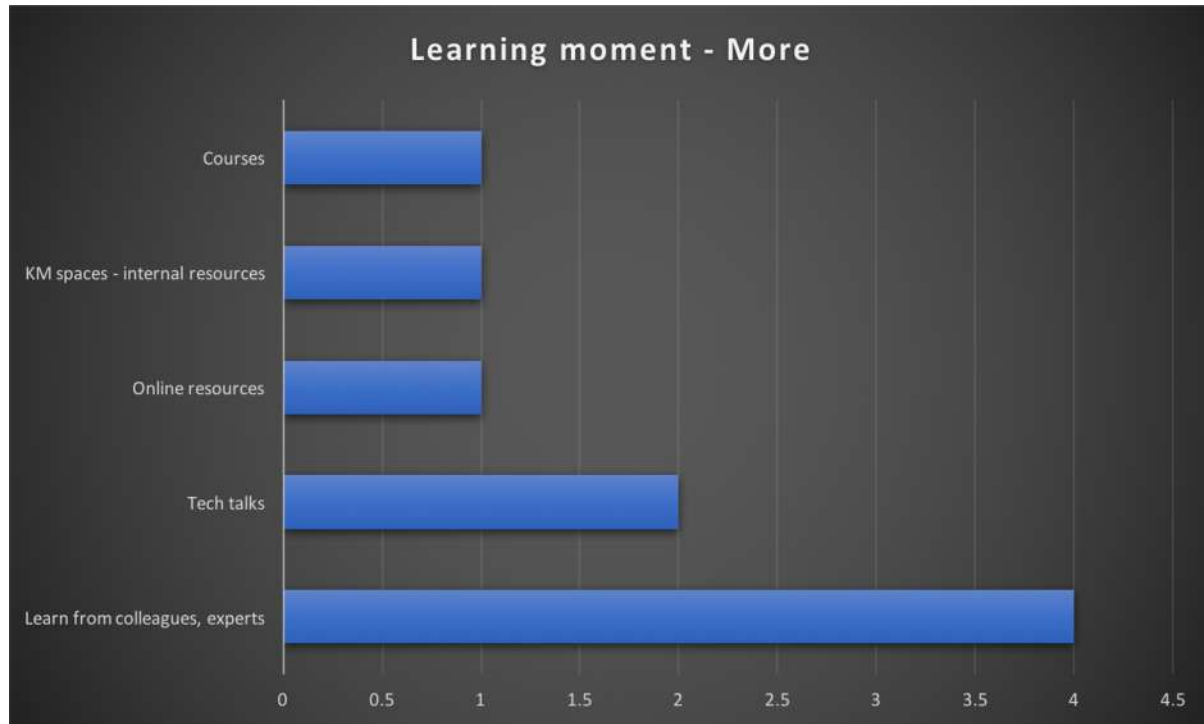
After Google, asking the experts/peers in the company is the most common approach. Hence, procedural templates along with a referential point of contact will be useful.



# 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

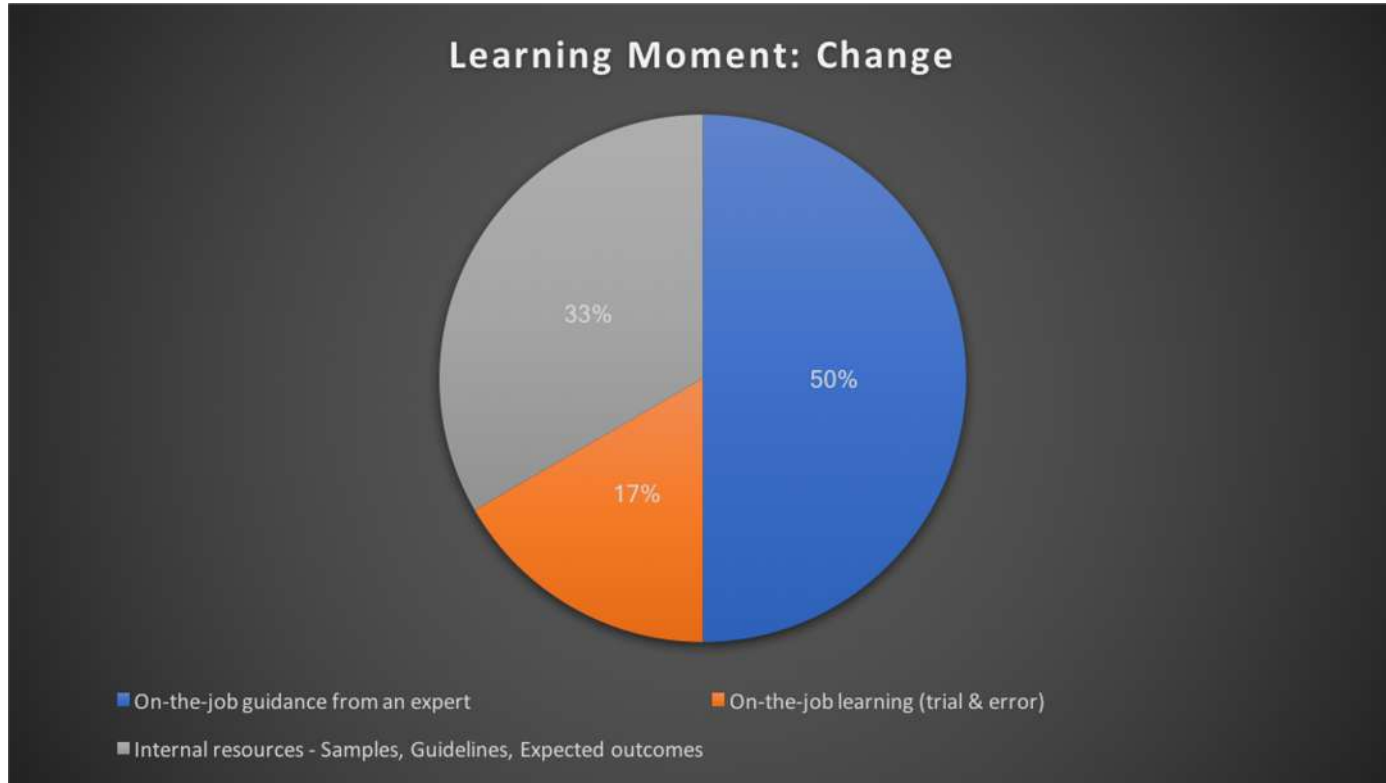
Most common approach is to learn from experts/peers



# Learning Moment:

## CHANGE

*(When things change)*



# 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



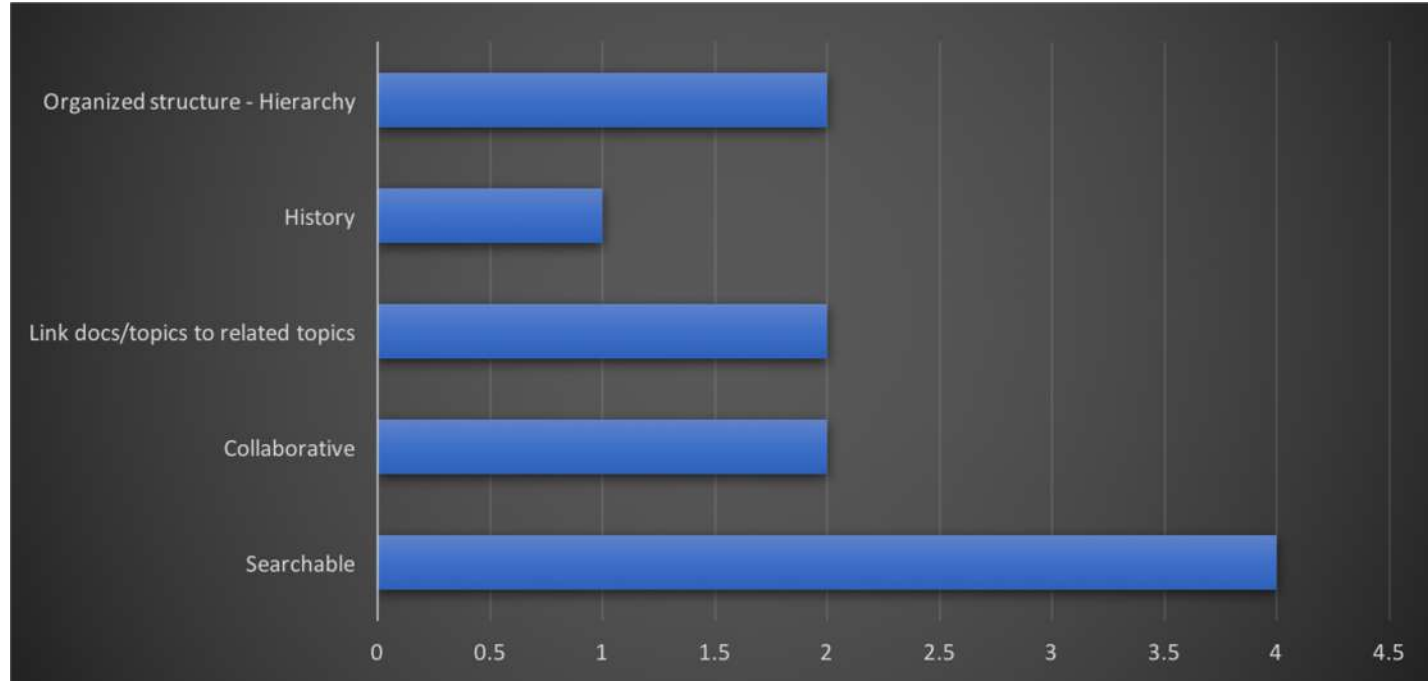


In this section

# 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

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0  
1

## Searchable

Provide Indexing and organized tree structures

## Collaborative

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



0  
3

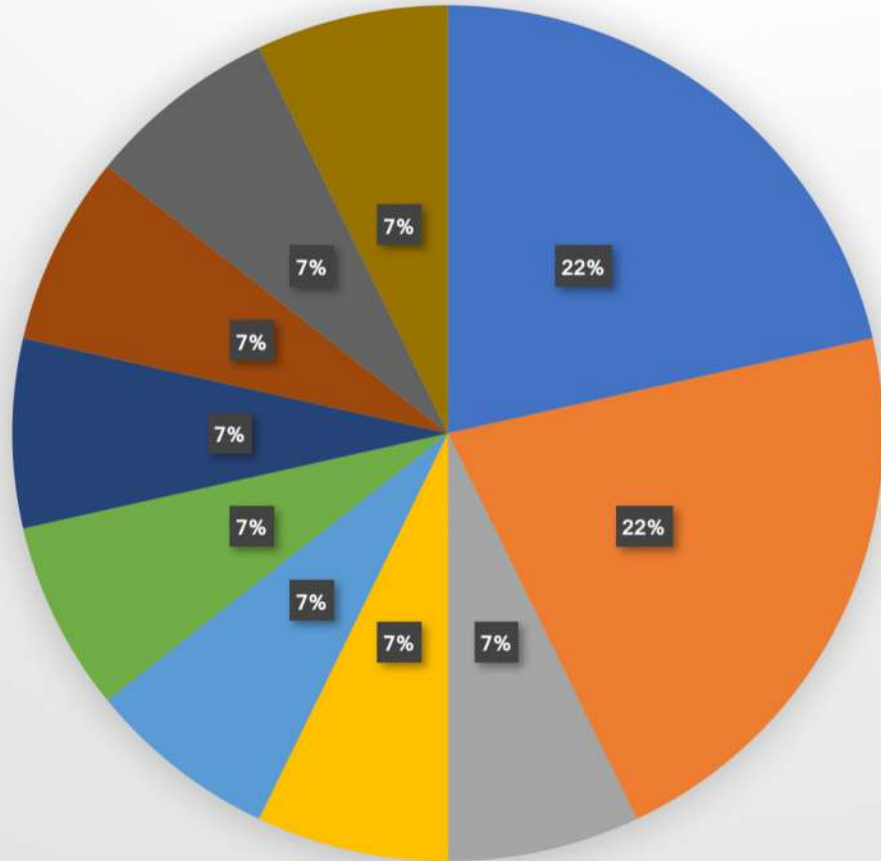
## Linking Related Documents

Provide robust Tagging



0  
2

# WHAT ANNOYS YOU ABOUT A KM TOOL?



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

# UX Recommendations



0  
1

## Bad Search

Fix indexing  
Enable Search by author, keyword, topic

## Information overload

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



0  
3

## Poor Maintenance

Include Version control  
Remain Compatible with other file types  
Embed it in the flow - for ex: email integration



0  
2



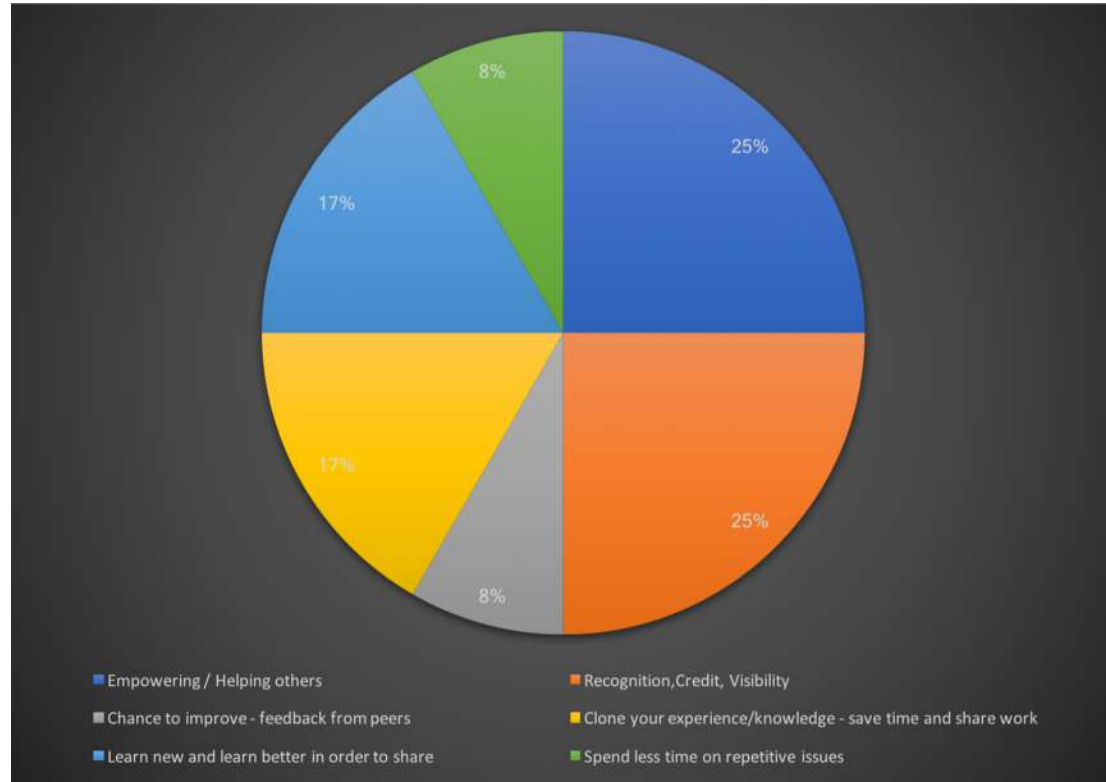
In this section

What are the perceptions around knowledge sharing - what motivates SMEs to share knowledge and what are the fears/painpoints NOT to share knowledge?

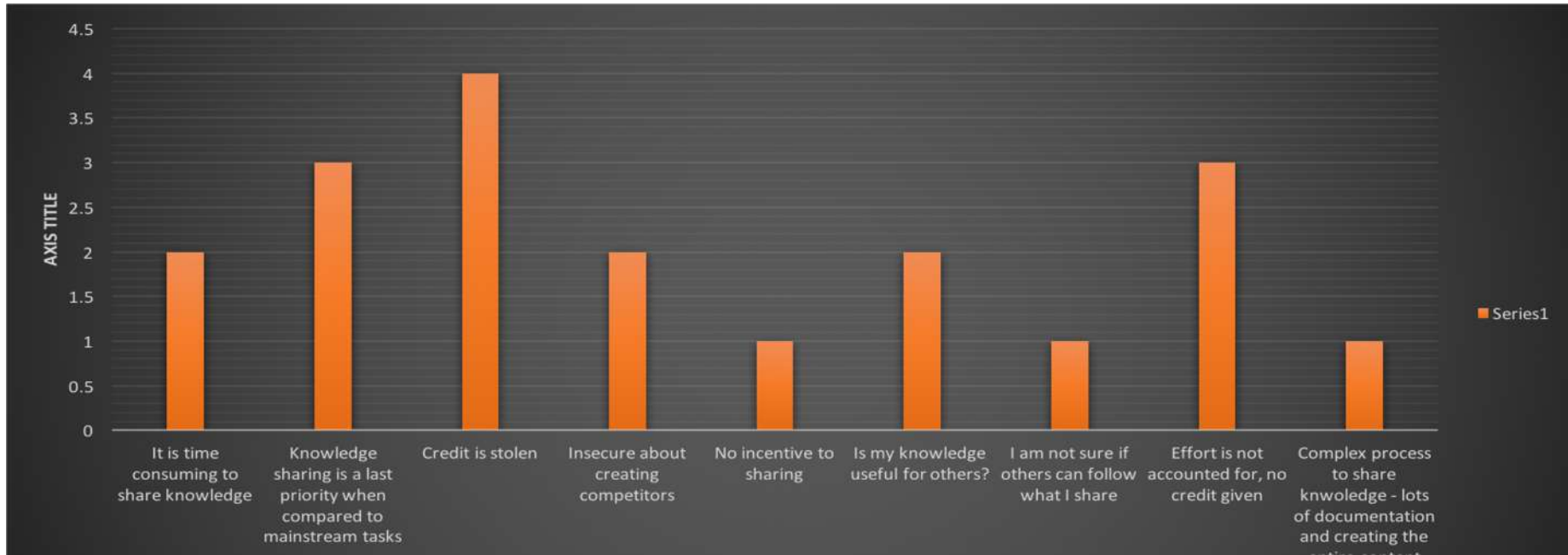
# Why do SMEs share Knowledge?



## Motivators



# Why DONT SMEs share Knowledge?





# UX Recommendations

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

## EXAMPLE:

### Motivation

Recognition/Credit/Visibility

### Product

- 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.**

