

Presentation by :
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Masterclass: How to Build a Knowledge Operations Strategy



Operational Knowledge

The actionable information AI or employees need to:

- Answer questions
- Perform tasks
- Solve problems



Goals

- Replace Tribal Knowledge moments
- For employees who have foundational knowledge:
 - *Empower* them to find answers on their own
- For employees who don't:
 - *Teach* them foundational knowledge
- Manage change



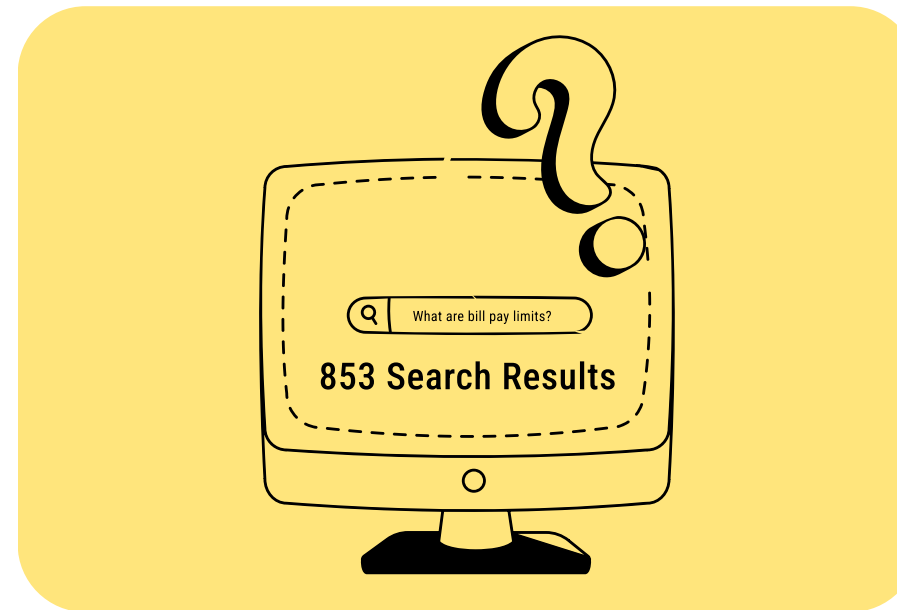
Knowledge Ops Maturity Model

Employee Independence



Tribal

"Phone a friend"



Document

"Search...Then phone a friend"



Guided

Find & Follow

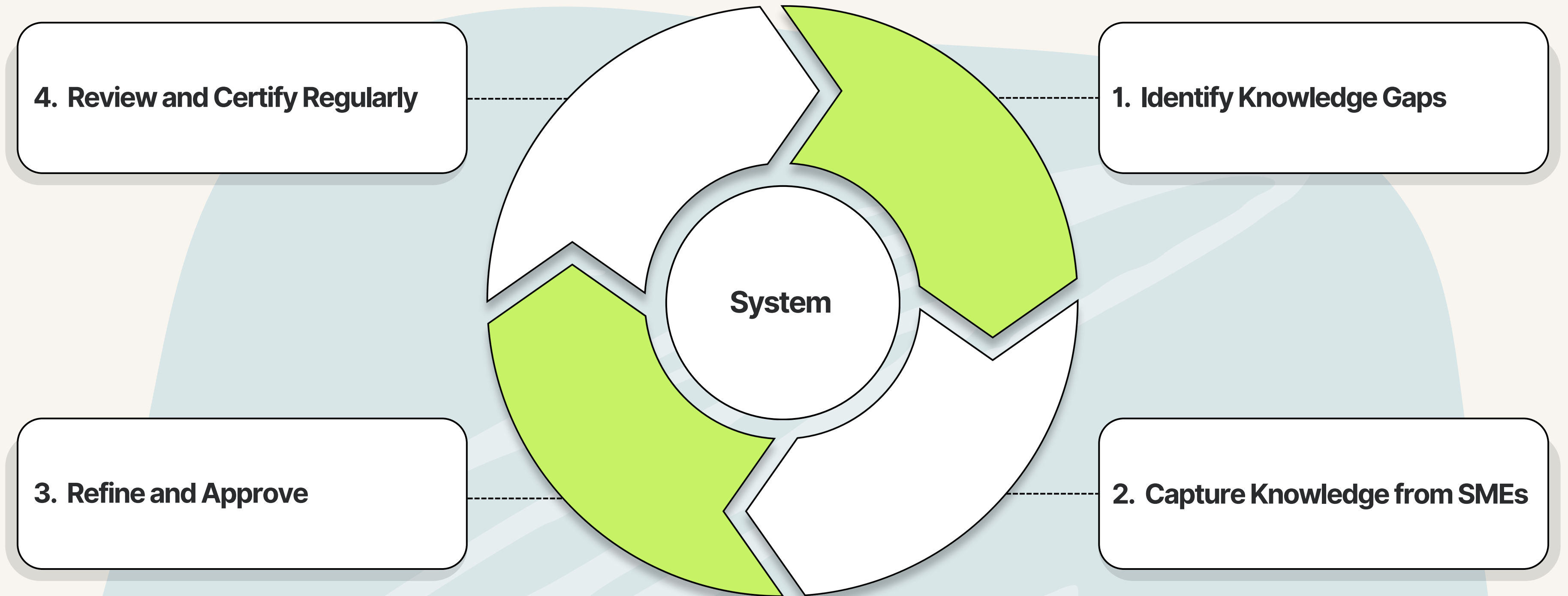
MAPPING YOUR JOURNEY

Questions to Ask

- Can an SME respond with a link?
- Can the employee find it on their own?
- Can an employee gain foundational knowledge on their own?
- Can an employee adapt to change instantly?



A Knowledge Operations System



Responding with a Link

- Identify what the questions are
- Create content that is followable and scannable



Empower employees to self-serve

- Match article titles to inputs
- Train them to identify inputs and search
- Redirect tribal knowledge questions



Teach Foundational Knowledge

- Identify concepts and definitions
- Build mini-courses for each topic



Manage Change

- Don't revert to tribal knowledge
- Use your Knowledge Ops Platform as the tool to communicate change
 - Small change: Send a notification
 - Large change: Build a mini-course



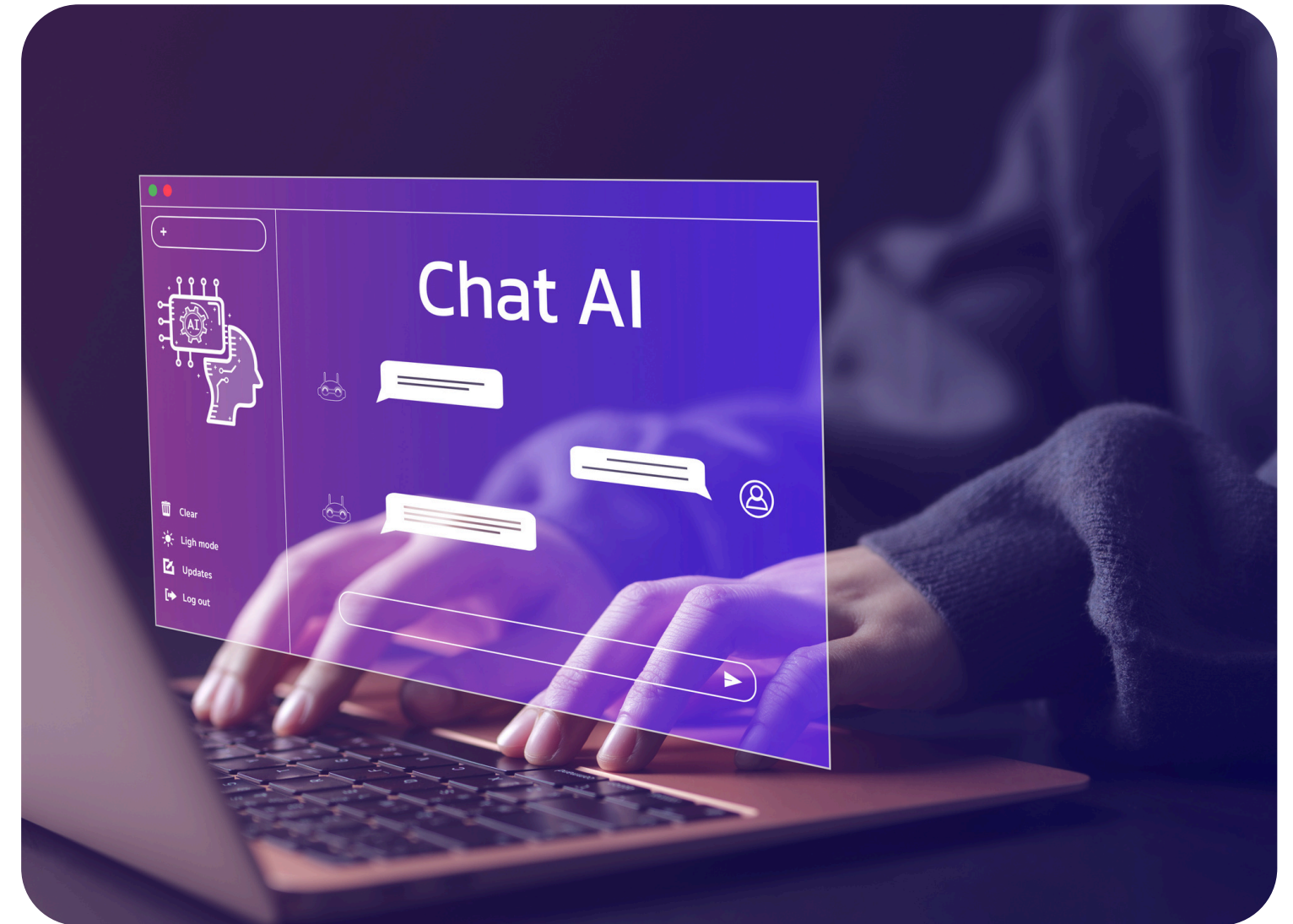
HOW DOES THIS PREPARE US FOR AI?

Assumptions

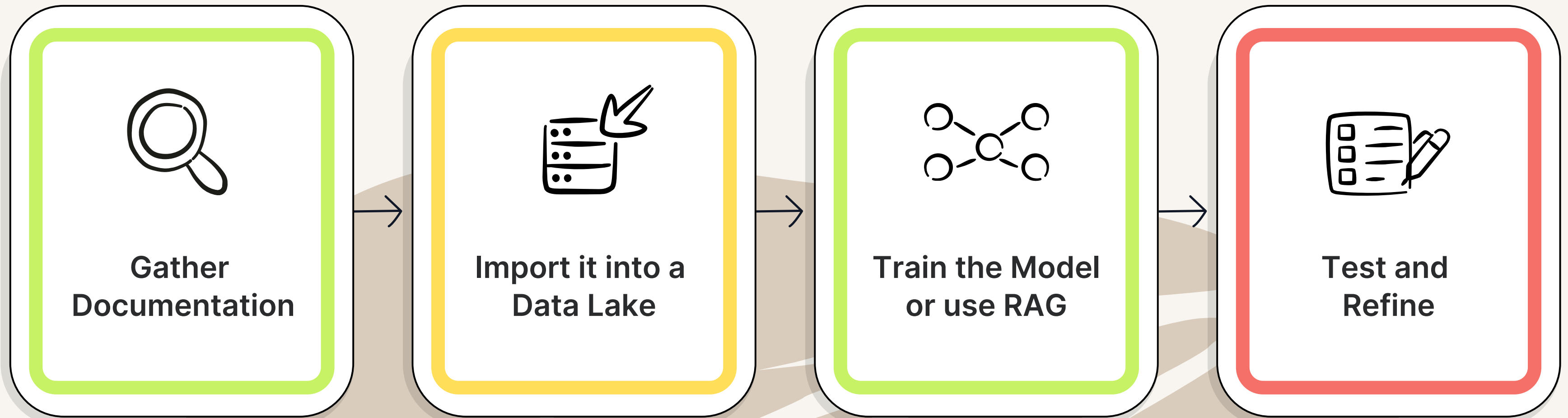
AI will figure out our junk-drawer of knowledge



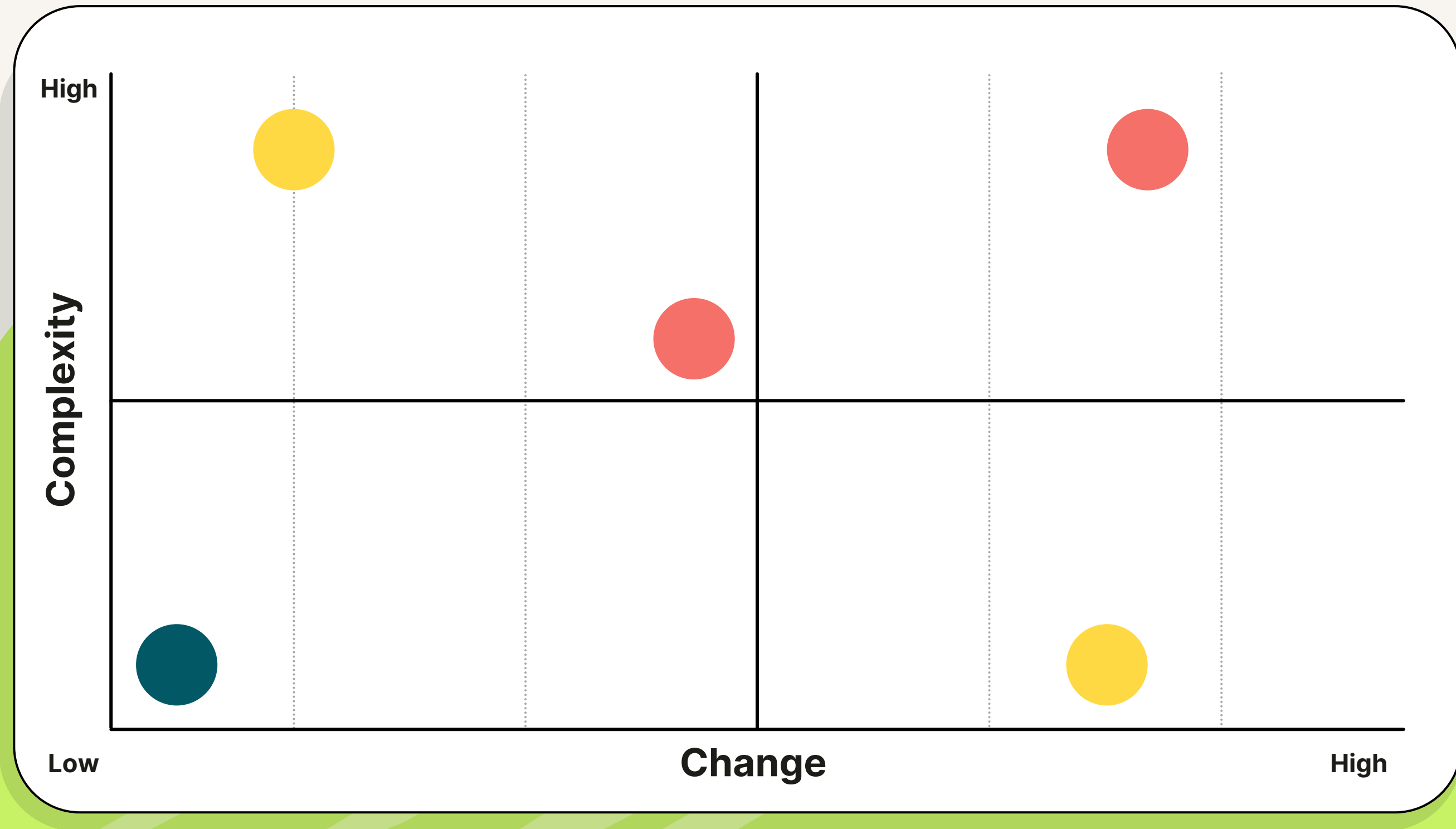
A chatbot is the best way to guide customers and agents



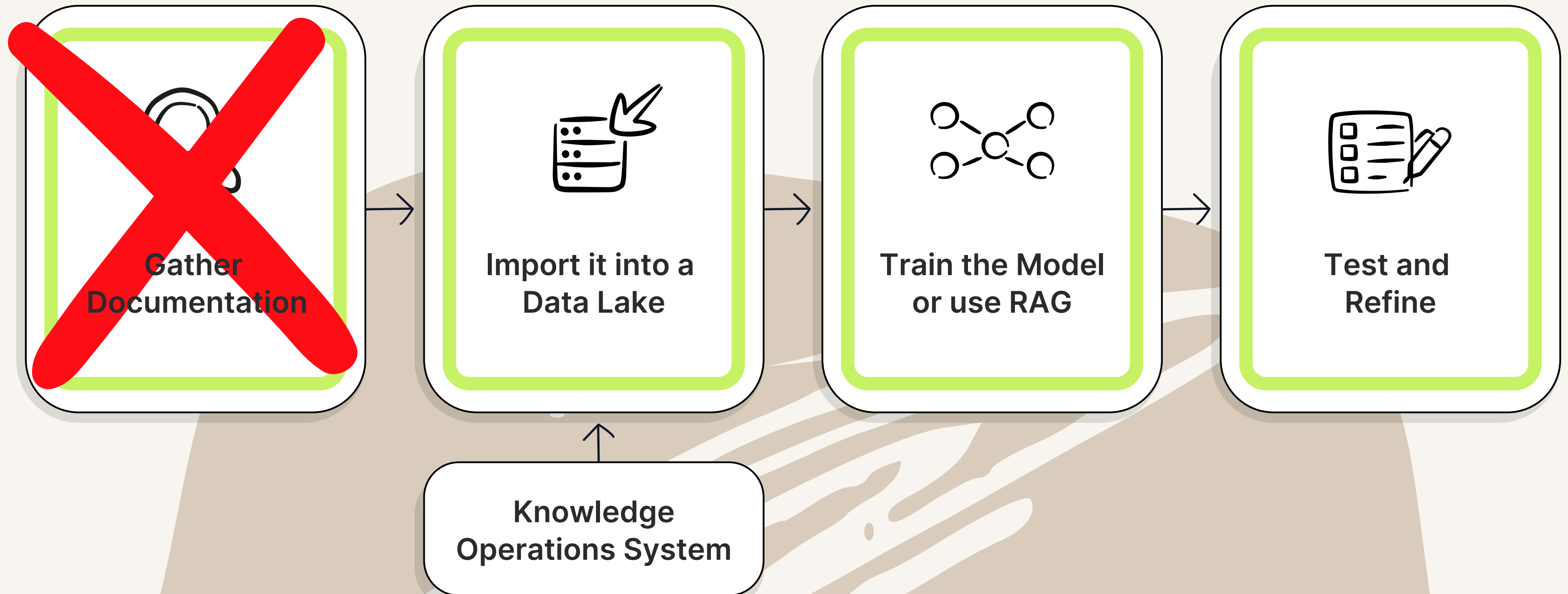
Typical AI Project



Complexity, Change, and AI



Inserting a Knowledge Ops Platform



Decision Trees and Checklists for Complex Procedures

Credit Union / Account Management / Opening Accounts

Opening a New Account

Updated on Aug 01, 2024

Verify Prospective Member Meets Criteria

☐ 1. Current Driver's License with Address



☐ 2. SSN OR TIN



☐ 3. Meet Eligibility Requirements



☐ 4. \$25 to open account

Does Prospective Member Meet the Above Criteria?

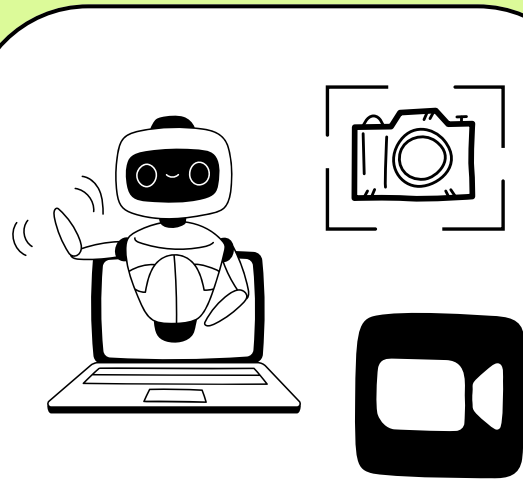
1. Select one Option Below

YES

NO

Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



**Integrated
Knowledge
Capture**



Micro-Courses



**Articles,
Checklists, and
Decision Trees**



**Change
Notifications &
User Feedback**



**Pushed Into
Workflow**

Questions?

Thank you for joining us!

(PROMISE UPHELD)

