



SCREENSTEPS

FIND & FOLLOW **WORKBOOK**

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How to Use this Workbook

This workbook is meant to support you as you read [*Find & Follow: Reduce Supervisor Burnout & Improve Employee Performance by Transferring Knowledge Faster*](#). You can **print it off or download it as a PDF**.

Fill out this workbook as you read *Find & Follow*. The purpose of the workbook is to help you:

- Apply the concepts in the book
- Reflect on the current state of your company's knowledge transfer strategy
- Better understand your company's knowledge ops
- Help you understand the key elements of the Find & Follow Framework
- Prepare talking points to present to your team if you decide you want to implement Find & Follow in your business



Download

You can download all the templates and other resources in this workbook at screensteps.com/find-follow-book/resources.



PART I – SOLVING THE KNOWLEDGE TRANSFER PROBLEM

Chapter 1: Defining the Pain

Write down the pains or problems your company is experiencing. How do you reframe these problems to be knowledge transfer problems?

Perceived Problem	Reframed Problem
<i>Ex: We have a learning problem where employees don't remember everything they learned in training.</i>	<i>Ex: We have a knowledge transfer problem where employees don't have access to the resources they need.</i>

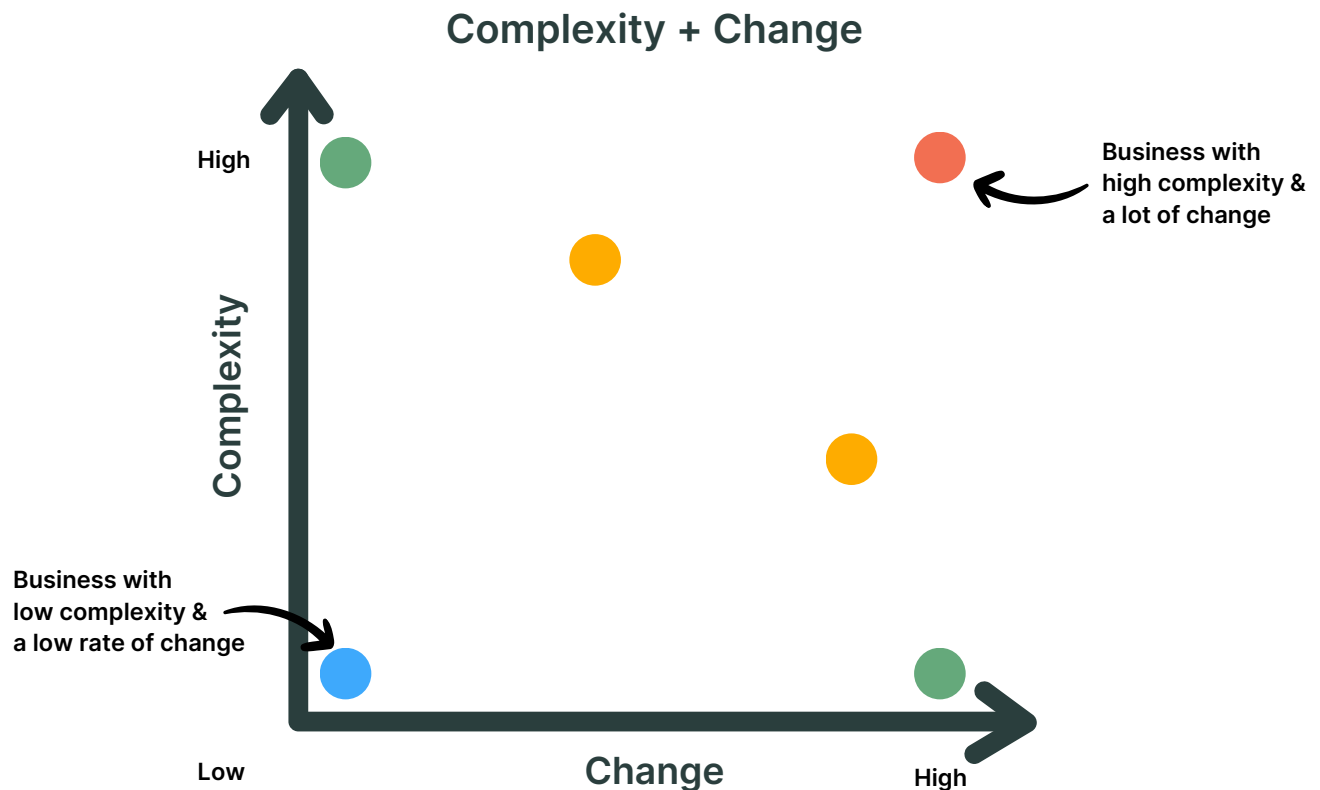


Chapter 2: You Have Already Experienced Find & Follow

What is a recent example where you had to do something new or unfamiliar and you applied the principles of Find & Follow? What was the experience like?

Where does your company fit on the Complexity and Change graph?

Plot your company on the Complexity and Change graph. Then explain why you put your plot point in that location below.



What makes your company that level of complexity?

How frequently do you deal with change? _____

How do you transfer knowledge to employees about changes?

What problems is that process creating?



PART II – KNOWLEDGE OPERATIONS

Chapter 3: Measuring Where You Are At—The Knowledge Ops Maturity Model

Take the [Knowledge Ops Maturity Grader](#) to determine where you are on the Knowledge Ops Maturity Model. You can take the modified version of the Grader below. For the full version and a more accurate score, take the evaluation online at screensteps.com/find-follow-book/resources/maturity-grader.

KNOWLEDGE OPS MATURITY GRADER

1. What percentage of your users' questions are answered in your documentation?
 - a. Less than 25%
 - b. 25%
 - c. 50%
 - d. 75%
 - e. More than 75%
2. What percentage of your complex processes have interactive digital guides? *(i.e. Interactive digital guides include documentation types like checklists or decision trees.)*
 - a. Less than 25%
 - b. 25%
 - c. 50%
 - d. 75%
 - e. More than 75%
3. How often can users find the documentation they need in under 5 seconds?
 - a. Never
 - b. Rarely
 - c. Sometimes
 - d. Often
 - e. Always



4. How often can users follow the information in your documentation without getting stuck or confused?
 - a. Never
 - b. Rarely
 - c. Sometimes
 - d. Often
 - e. Always
5. How easy is it for your users to scan your documentation to easily find the specific information they need?
 - a. Very challenging
 - b. Somewhat challenging
 - c. Neutral
 - d. Somewhat easy
 - e. Very easy
6. When an employee is stuck or unsure of what to do, what is their first reaction?
 - a. Run and hide
 - b. Put a question in Slack or Teams
 - c. Send an email for help
 - d. Speak to a co-worker or supervisor
 - e. Search documentation
7. When a supervisor receives a "How do I ..." question, what is their first reaction?
 - a. Run and hide
 - b. Answer the question the best they can
 - c. Point the employee to the company documentation

TOTAL YOUR RESULTS

Add up your total points with the scale to the right. Each question is worth 1-5 points. See where you land on the Knowledge Ops Maturity Model on the next page.

A	B	C	D	E
1 pt.	2 pt.	3 pt.	4 pt.	5 pt.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL SCORE				<input type="text"/>



Knowledge Ops Maturity Model



RESULTS

Which level was your company at on the Knowledge Ops Maturity Model?

Tribal Stage (7 – 16 points)

Your company relies primarily on tribal knowledge to transfer information.

Document Stage (17 – 25 points)

Your company has some documentation, but it isn't effectively transferring knowledge to your employees.

Guide Stage (26 – 33 points)

You have clearly documented guides and can transfer knowledge very efficiently to your employees.

NOTE:

*This modified Grader doesn't account for the **Train Stage** nor the **Accelerate Stage**. If you are in the Guide Stage AND have a training program that takes less than 30 days for new hires to reach proficiency, you likely will fall into the Train Stage.*

Take the full Grader here: screensteps.com/find-follow-book/resources/maturity-grader



Which level would you like your company to be at? Why?

Identify 3 key benefits that would make the biggest difference in your company if you were able to move up the Knowledge Ops Maturity Model.

1.

2.

3.

What is currently standing in your way of reaching higher stages of the Maturity Model?



Chapter 4: The Benefits of Moving Up the Knowledge Ops Maturity Model

What does operating down at the Tribal or Document Stages feel like for you and your team?

- How does it impact stress levels?
- Is your team feeling burnout?

How would things feel if you were operating at the Guide or Train Stages?



FIND & FOLLOW

How change-ready are you? How long does it take your team to adapt to change? Big changes? Small, day-to-day changes?

Identify key metrics your organization could track to measure the impact of moving up the Knowledge Ops Maturity Model. Check the benefits below and add your own to the list.

- ☐ Cost of time of supervisors answering questions and fixing mistakes
- ☐ Cost of employees waiting for answers from their supervisors
- ☐ Finance impact of mistakes made when procedures aren't followed correctly
- ☐ Opportunity cost of things that can't get done because supervisors don't have bandwidth
- ☐ Lost sales/retention because customers become frustrated with level of service
- ☐ Regulatory risk for non-compliance with procedures
- ☐ Onboarding costs associated with long Time to Proficiency
- ☐ Training costs
- ☐ Employee turnover because of high stress and low confidence
- ☐

- ☐

- ☐

- ☐



Use the Tribal Knowledge Cost Calculator to see potential cost savings: screensteps.outgrow.us/tribal-knowledge-cost-calculator



PART III – The Find & Follow Framework

Chapter 5: Three Core Beliefs of the Find & Follow Framework

Review the three core beliefs.

1. We can do more by memorizing less.
2. We can learn while we do.
3. We can clarify complexity.

Do you have any doubts about the core beliefs?

What is holding you back from believing the core beliefs of Find & Follow?



Chapter 6: The Four Systems

Write a summary of the Four Systems. What is the purpose of each system?

SYSTEM	PURPOSE
Prepare	
Train	
Empower	
Adapt	

Chapter 7: What You Need for Find & Follow

Executive Sponsorship

What concerns does your boss have around knowledge transfer? How about your top-level executives?

Write down those concerns. Now, what information do you need to present to them? This could include the ROI calculations you made in chapter 4 of this workbook or it could be the general culture and morale of your workplace.





Download

Create a Find & Follow presentation to show your boss. [Download our free Google slide deck template](#) to prepare a presentation.

Find & Follow Team

Identify your team players and their roles in Find & Follow.

ROLE	WHO IN YOUR COMPANY FILLS THESE ROLES?
Trainers	
Supervisors	
Coaches	
Frontline Workers	

Knowledge Base or Knowledge Ops Platform

If you have a knowledge base or other knowledge management system, evaluate your knowledge base software. If not, think about what features you need in software to achieve your company goals.

Can your knowledge base meet the needs of both your new and experienced employees? How and why?



Chapter 8: How Will Find & Follow Be Different Than What You Are Doing Now?

Fill out the chart below on the impacts of Find & Follow. What Find & Follow impacts/benefits are you most excited for?

ROLE	How it is with traditional training and operations	How it changes with Find & Follow (Impact)
New hires		
Tier 2 Support Reps		
Supervisors		
Trainers		
Content Authors		
Senior Management		



Download

For a detailed chart comparing traditional training to Find & Follow training, [check out this comparison chart](#).



Part IV – Implementing the Find & Follow Framework in Your Business

Chapter 9: Build Your Knowledge Ops Team

Build your Knowledge Ops Team. Identify who you have in each role and who you would need to hire.

ROLE	TEAM MEMBERS <i>(Who fills that role?)</i>
Knowledge Champion	
Knowledge Ops Manager (optional)	
Trainers	
Supervisors	
QA Experts	
Senior Frontline Employee	
Others <i>(People responsible for answering employee questions and fixing mistakes)</i>	

If you need more help determining who would make a good Knowledge Champion for your team, jump to the Appendix in the book and read the section on Knowledge Champions and Knowledge Ops Managers. You can also read a job description for a [Knowledge Champion here](#) and [Knowledge Ops Manager here](#).



Chapter 10: The Prepare System Part 1 – Align + Define

How will a Find & Follow Workshop help align your teams?



Download

[Download the Find & Follow Workshop Report Template](#). Use this template to take notes during your Find & Follow Workshop.



FIND & FOLLOW

Practice exercise: Run through one topic area for a specific role in your company.

(NOTE: This is just to practice using your workbook. You should NOT run a Find & Follow Workshop on your own. You need everyone who answers employee questions and fixes mistakes to work together.)

Topic Areas	Activities	Related Sub-Tasks	Variables	Concepts



Download

[Download the foundational course](#) on Find & Follow Workshops. Before running a Find & Follow Workshop, you can use this short foundational course to explain the workshop process, what you need from everyone, and what you will get out of doing the workshop.



Chapter 11: The Prepare System Part 2 – Design + Refine

Pull up one of your guides for your business. Evaluate it for the three core principles of writing digital guides.

- Is it findable, followable, and scannable?
- What are its weaknesses?
- How could you improve it?
- Does this guide mix both actionable and foundational knowledge?



Download

[Download the digital guide templates packet](#) to help you get started writing digital guides for your company.



Chapter 12: The Train System

Consider your current training program.

- How long does training take?
- How long does it take for employees to reach proficiency?
- How much time do you spend in lectures?
- How much time do you do with hands-on practice activities?
- How confident are employees when they leave training?
- How much stress do new hires experience during training?

How would Find & Follow help you transform your training program using this Train System?



Download

[Download the free training curriculum template.](#) This will help you outline a training curriculum after completing the Find & Follow Workshop with your team.

[Download the Foundational Course Presentation Template](#) for a reference on what to include in your foundational courses.



Chapter 13: The Empower System

Consider what supervisors do when new situations arise or questions get asked. Fill out the chart below with how these situations compare.

Your Current Situation	With the Empower System

Come up with a few phrases to use to respond to employees when they have questions and redirect them to your guides.

For example:

Employee: How do you extend the due date on a bill?

Supervisor: Great question! Have you checked the knowledge base yet?

Employee: I did, but I couldn't find the guide.

Supervisor: Here is a link to the guide for you to follow.

Choose a time on your calendar each week to regularly review analytics.



Chapter 14: The Adapt System

Identify common areas you experience change in your business. In the table, write down how you currently handle change. Then, in the third column, write how it would be different using the Adapt System.

Area of Change	How You Currently Handle It	How You Would Handle it with the Adapt System



Part V – Applying Find & Follow to Real Problems

Chapters 15 – 19

For chapters 15-19, list out the situations that apply to your business. What changes are you most excited for? Write down points from this section(s) that you could share with your team.

[illegible]

Want to see Find & Follow in action?

Read case studies from real customers about how Find & Follow has changed their business operations. Read those customer stories at screensteps.com/case-studies.

Part VI – Tips for Launching Find & Follow

Chapter 20: Choosing Where to Start

Assess your organization's needs and challenges, then select the most suitable launch strategy: task-focused, role-focused, or department-focused. Explain your rationale for choosing the specific approach.

Chapter 21: Addressing the Fears

Take some time to reflect on your own feelings about the Find & Follow program. Identify any concerns or fears you may have and consider how to address them. Then address those concerns with the solutions from the book.

If the book doesn't address all your concerns, you can [schedule a time to talk to a ScreenSteps expert](#). They can help you work through your fears and determine whether Find & Follow would be a good approach for your company.



Chapter 22: Doing an 80% Launch

Which procedures take up 80% of your employees' time?

- If you've run the workshop, go back and identify these on your Find & Follow Report. These are the guides that you need to create first.
- If not, you may think of a few of the most common procedures in your company.

Choose a launch date. _____

(If you already have buy-in and your team is committed to launching a Find & Follow program. You can propose this launch date to your team.)

Chapter 23: Optimizing Your Knowledge Operations After Launching Find & Follow

Design a calendar or checklist for periodic reviews of less frequently used digital guides, ensuring they remain accurate and up-to-date. This can be as simple as saying, "I'll review user reports every Monday afternoon at 2 pm."



Part VII – Summing Up

Chapter 24: Confidence, Consistency, and Independence

Take a minute to reflect on everything you've read and written. How do you think Find & Follow would help your organization transfer knowledge more efficiently? Write down your top 5 reasons for wanting to implement Find & Follow in your organization.

1.

2.

3.

4.

5.



Appendix – Best Practices and Tips

For additional resources about the information in our Appendix, visit the [ScreenSteps Learning Center](#) and subscribe to our [YouTube Channel](#). We update these channels weekly with new tips and strategies for better implementing Find & Follow and transferring knowledge.

Running a book club?

Want to run a *Find & Follow* book club with your team? [Download the free book club outline](#). The 3-week program includes questions to help you break up the reading and discuss the main ideas of the book.

