

# "We have great processes...they are not documented."

## Capturing Tribal Knowledge

### INFORMATION SHOULD RESIDE IN SYSTEMS

#### ABOUT US

Takmos LLC is a technical writing firm based in Ventura, California serving a range of industries.

We specialize in capturing tribal knowledge, creating manuals and procedures, and providing plain language summaries of technical materials.

#### SOLUTIONS

We develop instruction manuals, Wiki pages, guidance documents, and operating procedures for both regulated and unregulated industries.

#### CONTACT

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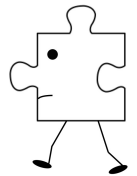
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#### Capturing tribal knowledge is a business imperative

The title of this case study is a direct quote from a Takmos client. A small, family-owned business with robust processes, the client recognized the peril in relying on a few individuals to serve as a walking wikipedia, or "Walking Wiki".

#### The Walking Wiki

An individual with encyclopedic organizational knowledge, who is the sole source for this information, is a Walking Wiki. A natural phenomenon in the organizational ecosystem, Walking Wikis are typically highly-valued, yet their productivity is hindered by the constant interruptions from the rest of the organization.



Walking Wiki

This is one example of tribal knowledge.

#### Walking Wikis are not institutional knowledge

Institutional knowledge exists when information resides in systems and processes; historical data is translated into wisdom such that the totality of the organizational experience informs decisions. Walking Wikis undermine institutional knowledge.

Imagine a vast library without any form of catalog. How would we know what information is available? How would we find specific information?

We could wander the aisles and browse, but this is inefficient and we might never find what we need. We could ask one of the few librarians to locate the information, but this introduces bias; the librarian makes judgments as to what information is important. That's why the most robust search strategy utilizes a combination of these search modes (catalog, librarian, browsing). Similarly, an organization can best identify and leverage historical organizational data to inform future decisions when information is known and accessible.

Does your organization have a catalog of knowledge? Or do you rely entirely on a small number of experts to answer all questions?

**Turn the page to learn more.**



## CAPTURING TRIBAL KNOWLEDGE

### Systematic knowledge management is not just for big companies

Takmos specializes in capturing knowledge in systems. For the client mentioned above, we developed a knowledge-capture strategy, document templates, and an instruction manual for a complex customer-facing process. Habits and practices that made an organization competitive in the past can be a barrier to growth. We can provide right-sized solutions.

### There are no instant solutions

Capturing tribal knowledge requires an appreciation for organizational structure and culture, and an ability to work with existing systems and processes. It is not a fast or simple process. Before engaging a knowledge capture project, consider the following:

#### Step 1: Take inventory and identify gaps

Do you have a network drive with documents in various states of completion? An abyss once neatly organized that has devolved into chaos?

Do you rely on one or more Walking Wikis? The Walking Wiki Test provides just a sample the signs your organization relies on a Walking Wiki.

### WALKING WIKI TEST

1. Do you answer the question "How do I ...?" with "Go ask...?"
2. Are there one or more critical databases that can used and/or maintained by only one person?
3. Do you joke that the organization would be sunk if certain employees won the lottery or were hit by the proverbial bus?
4. Does on-boarding new people involve extensive yet informal job shadowing of the individual named in Question #1?

If you answered **YES** to any of the above, your organization relies on a Walking Wiki.

**Turn the page to read about the Takmos strategy for capturing tribal knowledge.**



# Takmos



## CAPTURING TRIBAL KNOWLEDGE

### Step 2: Develop the right documentation strategy

How should this information be captured? Where should it reside and in what form?

The right documentation strategy considers the following:

- Who is the audience for the information?
  - Customers?
  - Internal Stakeholders?
  - Sometimes both?
- How often will the information be updated?
  - Yearly?
  - Monthly?
  - More frequently?
- What is the purpose of the information?
  - Critical process controls?
  - Customer communication?
  - Internal training?

Customer-facing documents, including product information sheets and product manuals, are typically static documents with revision control to ensure the consistency and quality of information conveyed to the customer.

Internal requirements documents, including standard operating procedures, design rules, and instruction manuals, will also be static documents with revision control. Under certain circumstances internal documents may be customer accessible.

Internal training and process documents not subject to audit may be highly fluid with rapid changes. For these documents Wiki tools might be the right solution.

### Step 3: Create a project plan that sets achievable goals

Knowledge capture is a time-intensive activity whose business value can be hard to appreciate at first glance. Our approach respects the time and contributions of your subject matter experts.

Client engagement typically begins with a no-cost 4-hour work session to learn about the challenges specific to your organization. We then develop a project plan with achievable goals to capture tribal knowledge, thereby freeing your valuable subject matter experts from their responsibilities as a Walking Wiki.

**Contact us today to schedule a no-cost 4-hour work session to learn how Takmos can help you.**

