

**TRIBAL KNOWLEDGE**

in

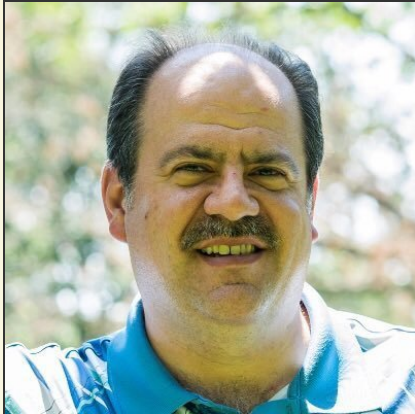
**AGILE TEAMS**

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**KNOWLEDGEPLAYBOOK.COM**

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- Full stack Microsoft developer
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- Continuous Delivery lead
- Conference speaker
- Children's author ("Skeeters")
- ***New dad***



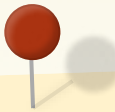
[skeeterbooks.com](http://skeeterbooks.com)





***SLIDE 1 OF 1***  
***PRESENTATION***  
***intentionally***  
***LEFT BLANK***





**IMAGINE...  
YOU'RE  
DOING IT  
WRONG!!**

# SORRY



**ARE YOU FEELING...**

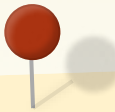
**EMBARASSMENT?**

**FRUSTRATION?**

**ANGER?**



***STOP -  
IT'S NOT  
YOUR FAULT!***



**TRIBAL KNOWLEDGE?**

**INFORMATION KNOWN**

**WITHIN A TRIBE** but

**UNKNOWN OUTSIDE** - Wikipedia



**WHAT YOU  
DON'T KNOW...**

**THE PROBLEM**

# COST OF KNOW-HOW LEAKS

- Waiting for answers
- Introduction of defects
- Outages
- Non-adherence to standards
- Rework

**THE SOLUTION?**

**LET'S NOT DO THIS  
AGAIN**

# WHY THIS IS HARD

- You can't know everything
- Tacit knowledge is hard to transfer
- Sometimes experts can't teach
- Misconceptions about "Agile" and documentation
- **NO SILVER BULLETS**





WHAT'S IN THE WAY?



**THE RESULT?**

**ERODING TRUST**



**WHEN DO LEAKS  
HAPPEN?**



I QUIT!

A woman with dark hair and bangs, wearing a white patterned blouse, is shaking hands with a bearded man in a light blue shirt and red tie. They are both smiling. The background shows an outdoor setting with string lights and greenery.

**YAY! PROMOTION!**





RETIREMENT



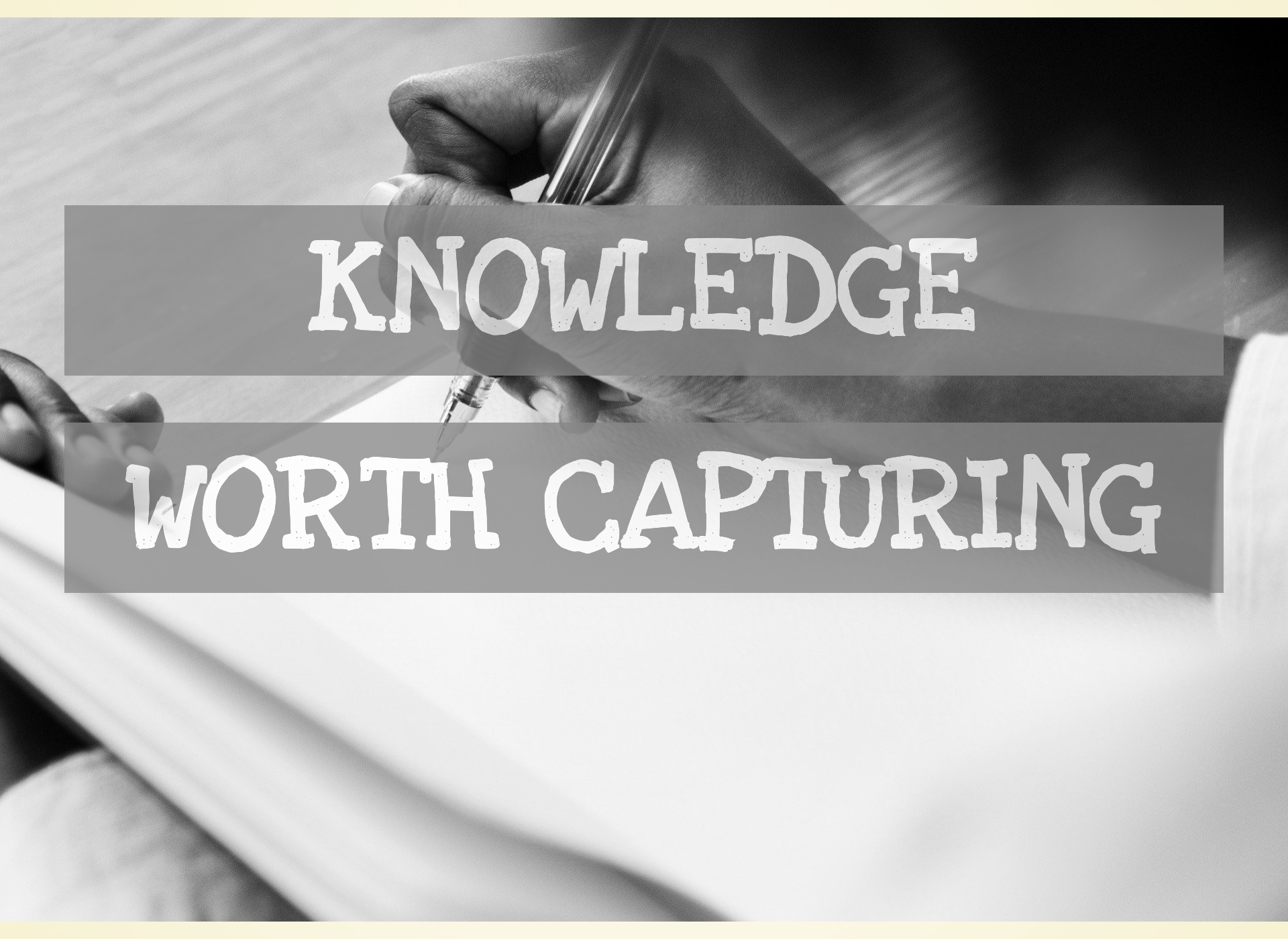
OUT SICK! :-)



**OR WORSE...**

**PASSED AWAY**

**SUDDENLY**

A black and white photograph of a hand holding a pen, writing on a document. The hand is positioned in the upper center of the frame, with the pen tip touching the paper. The document is slightly blurred, showing some text and lines. The overall tone is professional and focused.

KNOWLEDGE

WORTH CAPTURING



**STRATEGY:**

**BE A SPONGE!**

# STRATEGY: START WITH YOURSELF

Personal capture methods

Turn ideas into action!

# PERSONAL CAPTURE

- Paper: Notebook or Journal
- OneNote or EverNote
- Simple Word docs
- Email yourself
- Whiteboard photos
- Mind maps (Freeplane!)

**STRATEGY:**


**MAKE**


**RETROSPECTIVES**

**COUNT**

# NASA LESSONS LEARNED

[←](#) [→](#) [↻](#) [🔒](#) [nasa.gov/offices/oce/functions/lessons/index.html](#) [☆](#) [🌱](#) [🔍](#) [👤](#) [⋮](#)

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## Office of the Chief Engineer

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## NASA Lessons Learned

The NASA Lessons Learned system is a database of lessons learned from contributors across NASA and other organizations. It contains the official, reviewed learned lessons from NASA programs and projects. Its varied contents are sought by thousands of visitors a month who represent a multitude of disciplines including science, engineering, education, manufacturing, and project management.



The NASA Lessons Learned system includes lessons learned from the loss of the Space Shuttle Columbia

The system and its content are managed by the NASA Lessons Learned Steering Committee (LLSC), composed of members from all NASA Centers. The Lessons Learned system curator, who serves under the direction of the LLSC Chairperson, has operational responsibilities for the system.

The Lessons Learned system contains a growing database, with lessons added on a fairly regular

**PRO TIP:**

**NAME YOUR LESSONS**

**ARTICULATE THEM, IN WRITING  
DEBRIEF YOURSELF (QUICKLY!)**

**DON'T LET A BAD PROJECT BE  
AMBIGUOUSLY BAD. NAME THE  
PROBLEMS.**

**STRATEGY:  
BLAMELESS  
POSTMORTEMS**



**STRATEGY:  
UP YOUR CAPTURE  
GAME!**

# SCREEN SHOTS

The need for speed!

- SnagIt!
- Greenshot
- Snipping Tool
- Features: Drawing and "Send to" routing

**KNOWLEDGE**

**WORTH FINDING**

# DISCOVERABILITY

- Put things where they can be found
- Spell correctly
- Avoid acronyms and jargon
- Make links from other places
- Pick good stand-alone titles

**KNOWLEDGE**

**WORTH SAVING**

**STRATEGY:**

**SCAVENGER HUNT**

**A.K.A**

**"ARCHAEOLOGY"**







# TOUR GUIDES CAN HELP (IF YOU CAN FIND THEM)



The background of the image is a foggy cemetery. In the foreground, there are several dark, weathered tombstones of various shapes and sizes. The ground is covered in green grass. In the background, more tombstones are visible, but they are shrouded in a thick, grey fog that obscures the horizon. The overall atmosphere is somber and mysterious.

# SHAREPOINT

"Where information goes to die!"

JUST KIDDING (MOSTLY)

**STRATEGY:**

**SCAVENGER HUNT:**

**RAID SHAREPOINT**



**STRATEGY:**

**SCAVENGER HUNT:**

**MINE YOUR HARD**

**DRIVE**

**STRATEGY:**  
**IMPROVE YOUR**  
**ONBOARDING**



U-HAUL

ONE-WAY & IN-TOWN MOVES

DRIVE A U-HAUL  
LATELY?

DC 4578





U-HAUL

ONE-WAY & IN-TOWN MOVES

# THE TALE OF TOW-HAUL MODE

DC 4578



A close-up photograph of a vehicle's dashboard. The focus is on a glowing yellow indicator light that reads "TOW HAUL" in two lines. Above the light, there are some white markings, including the letter "L" and a red dash. To the right, a portion of a black circular button with an orange lever is visible. The dashboard surface is dark and textured.

TOW  
HAUL

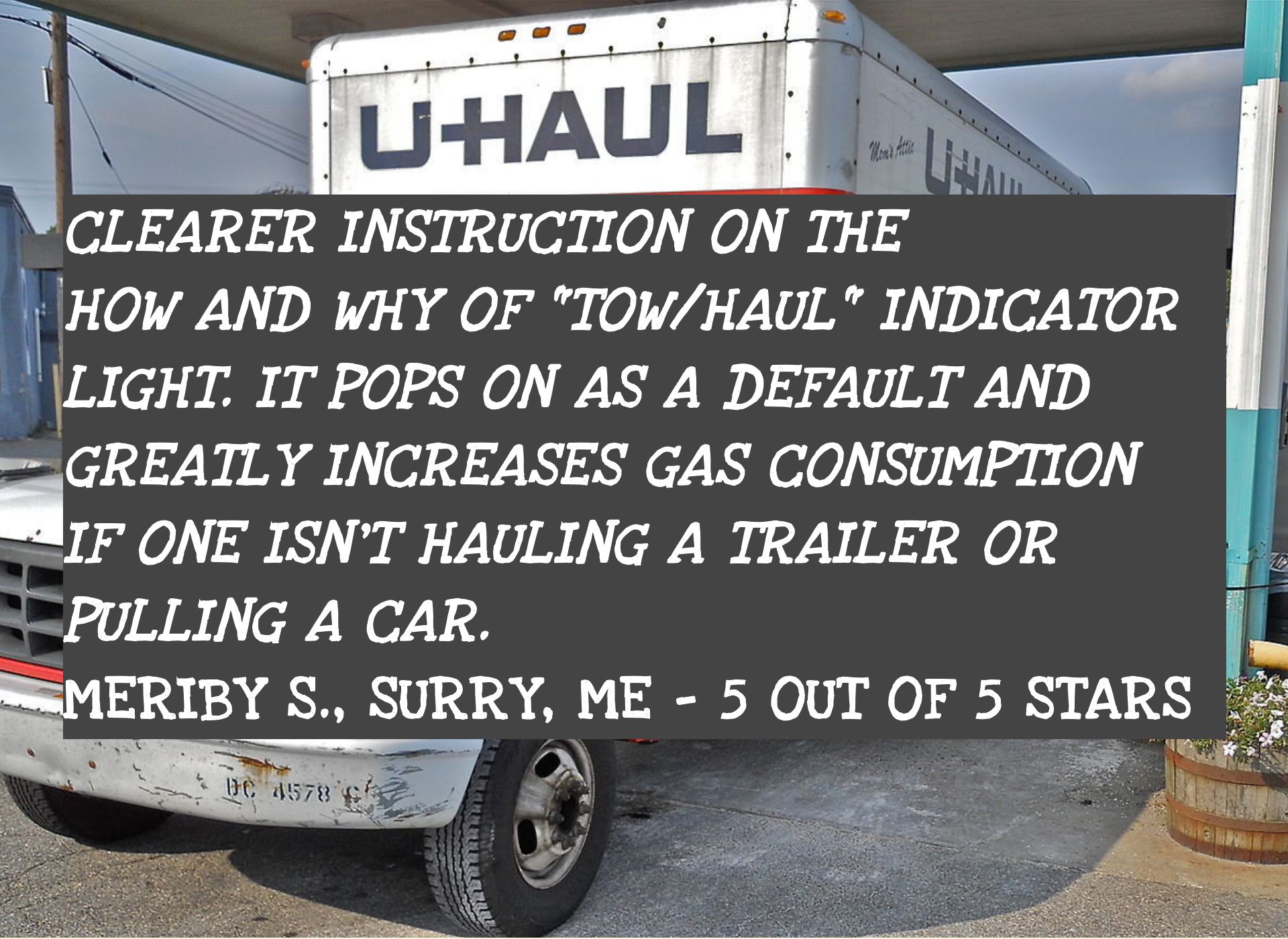
WHAT'S THIS  
LIGHT?



GOOGLE SEARCH: "TOW/HAUL" SITE:UHAUL.COM

*GOOD SERVICE. TRUCK WORKED OK,  
ALTHOUGH THE LIGHT FOR  
TOW/HAUL WAS ON THE ENTIRE TIME.*  
MARWAN K., ATLANTA, GA - 5 OUT OF 5  
STARS





*CLEARER INSTRUCTION ON THE  
HOW AND WHY OF "TOW/HAUL" INDICATOR  
LIGHT. IT POPS ON AS A DEFAULT AND  
GREATLY INCREASES GAS CONSUMPTION  
IF ONE ISN'T HAULING A TRAILER OR  
PULLING A CAR.*

*MERIBY S., SURRY, ME - 5 OUT OF 5 STARS*



**U-HAUL**

ONE-WAY & IN-TOWN MOVES

U-HAUL

***THE STAFF WAS FRIENDLY... I WISH THE  
TOW/HAUL FEATURE WOULD HAVE BEEN  
EXPLAINED TO ME IN THE BEGINNING.  
TERRENCE M., KEY WEST, FL - 3 OUT OF 5  
STARS***





*I GOT INTO THE TRUCK AND STARTED IT, THE  
TOW HAUL LIGHT WAS ON,*

*I CALLED THE OFFICE BEFORE I LEFT THE  
PARKING LOT TO ASK WHAT THE LIGHT WAS ON  
FOR?*

*AND THE MAN IN THE OFFICE EXPLAINED IT  
TO ME*

*WITHOUT MAKING ME FEEL STUPID.*

*THANKS*

*MARY B., GRAYSLAKE, IL - 4 OUT OF 5 STARS*

# ONBOARDING ADVICE

- Always think like "the new guy"
- Consider the perspective of others
- Work together to update the docs
- Create a record...or ***recording!***

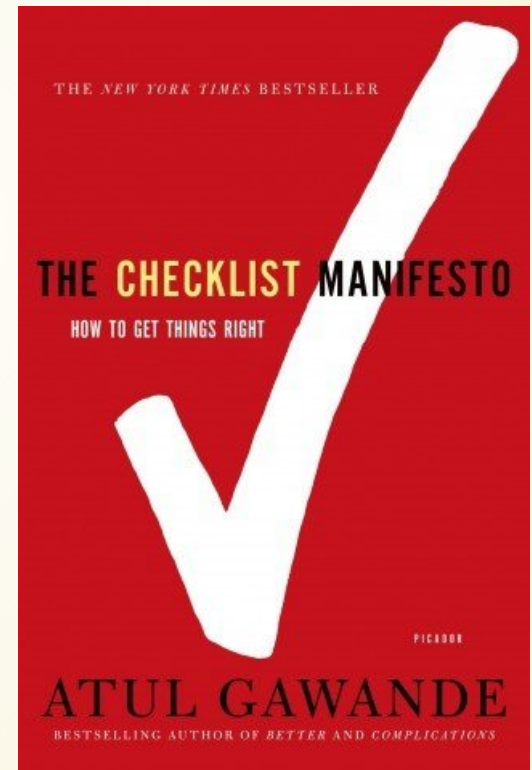
**STRATEGY:**

**USE CHECKLISTS**



# CHECKLIST MANIFESTO

by Atul Gawande



# SURGICAL SAFETY CHECKLIST (FIRST EDITION)

Before induction of anaesthesia ▶▶▶▶▶▶▶▶▶▶ Before skin incision ▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶▶ Before patient leaves operating room

IN
PATIENT HAS CONFIRMED • IDENTITY • SITE • PROCEDURE • CONSENT
SITE MARKED/NOT APPLICABLE
ANAESTHESIA SAFETY CHECK COMPLETED
PULSE OXIMETER ON PATIENT AND FUNCTIONING
DOES PATIENT HAVE A: KNOWN ALLERGY? NO YES
DIFFICULT AIRWAY/ASPIRATION RISK? NO YES, AND EQUIPMENT/ASSISTANCE AVAILABLE
RISK OF >500ML BLOOD LOSS (7ML/KG IN CHILDREN)? NO YES, AND ADEQUATE INTRAVENOUS ACCESS AND FLUIDS PLANNED

TIME OUT
<input type="checkbox"/> CONFIRM ALL TEAM MEMBERS HAVE INTRODUCED THEMSELVES BY NAME AND ROLE
<input type="checkbox"/> SURGEON, ANAESTHESIA PROFESSIONAL AND NURSE VERBALLY CONFIRM • PATIENT • SITE • PROCEDURE
ANTICIPATED CRITICAL EVENTS
<input type="checkbox"/> SURGEON REVIEWS: WHAT ARE THE CRITICAL OR UNEXPECTED STEPS, OPERATIVE DURATION, ANTICIPATED BLOOD LOSS?
<input type="checkbox"/> ANAESTHESIA TEAM REVIEWS: ARE THERE ANY PATIENT-SPECIFIC CONCERNS?
<input type="checkbox"/> NURSING TEAM REVIEWS: HAS STERILITY (INCLUDING INDICATOR RESULTS) BEEN CONFIRMED? ARE THERE EQUIPMENT ISSUES OR ANY CONCERNS?
HAS ANTIBIOTIC PROPHYLAXIS BEEN GIVEN WITHIN THE LAST 60 MINUTES?
<input type="checkbox"/> YES <input type="checkbox"/> NOT APPLICABLE
IS ESSENTIAL IMAGING DISPLAYED?
<input type="checkbox"/> YES <input type="checkbox"/> NOT APPLICABLE

SIGN OUT
NURSE VERBALLY CONFIRMS WITH THE TEAM:
<input type="checkbox"/> THE NAME OF THE PROCEDURE RECORD
<input type="checkbox"/> THAT INSTRUMENT, SPONGE AND NEEDLE COUNTS ARE CORRECT (OR NOT APPLICABLE)
<input type="checkbox"/> HOW THE SPECIMEN IS LABELLED (INCLUDING PATIENT NAME)
<input type="checkbox"/> WHETHER THERE ARE ANY EQUIPMENT PROBLEMS TO BE ADDRESSED
<input type="checkbox"/> SURGEON, ANAESTHESIA PROFESSIONAL AND NURSE REVIEW THE KEY CONCERNS FOR RECOVERY AND MANAGEMENT OF THIS PATIENT

# EFFECTIVE CHECKLISTS

- Stick to one page
- Use natural "pause points"
- Use dark text on a light background
- Are not a tutorial
- Protect against mistakes

**STRATEGY:**

**ASK POWERFUL  
QUESTIONS**

**STRATEGY:**

**TRANSFORM EMAIL**



# EMAIL WOES

- long, messy threads
- read? who knows?
- cluttered mailboxes
- retention limits

# MAKE EMAIL WORK

- Create smart categories:  
***Knowledge Base*** and ***Onboarding***
- Create ***Quick Steps*** for quick filing
- Create ***Search Folders*** to find fast

# SEARCH FOLDERS

Use your Favorites

# AND WORK!

- Automate common responses and infrequent requests
- Use email signatures for common copy
- Send to OneNote can work wonders

**STRATEGY:**

**AUTOMATE YOUR**

**KNOWLEDGE!**



**INSPECTOR VIEWS**

A hand holding a black pen is positioned over an open, grid-lined notebook. The notebook is resting on a light-colored wooden surface with visible grain. The scene is brightly lit, creating soft shadows. The text 'STRATEGY:' is overlaid in a white, bold, sans-serif font on a dark grey rectangular background.

**STRATEGY:**

**CREATE A  
PLAYBOOK**

# WHAT'S IN IT?

- Situational guidance
- Reference material
- Checklists
- Questions
- KIT = Keep It Together

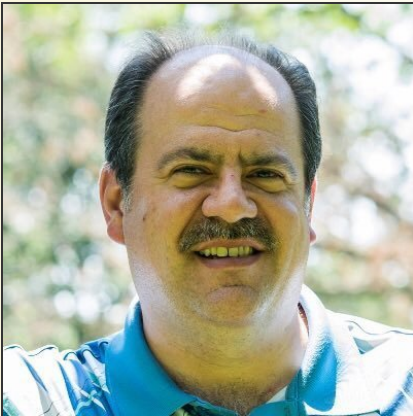
**QUESTIONS?**

# THANK YOU

Slides at:

[KNOWLEDGEPLAYBOOK.COM](http://KNOWLEDGEPLAYBOOK.COM)

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Check out *Skeeters*:  
[skeeterbooks.com](http://skeeterbooks.com)

