

# **TRIBAL KNOWLEDGE**

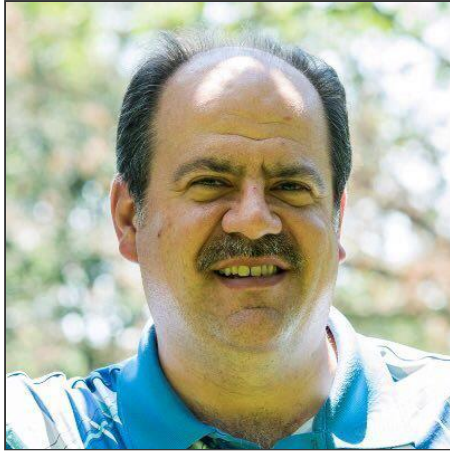
*in*

# **AGILE TEAMS**

Jeffrey A. Miller - [@xagronaut](https://twitter.com/xagronaut)

**KNOWLEDGEPLAYBOOK.COM**

# JEFFREY A. MILLER

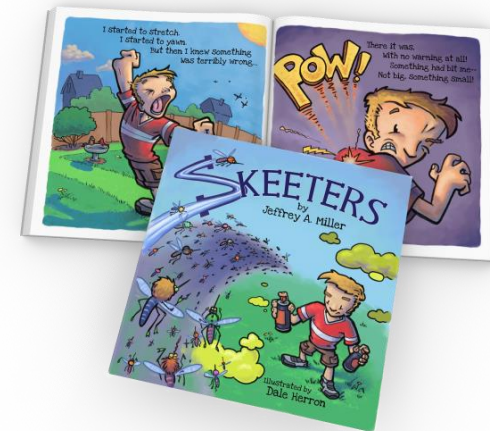


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[skeeterbooks.com](#)





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





***TRIBAL KNOWLEDGE?***

***INFORMATION KNOWN***

***WITHIN A TRIBE*** *but*

***UNKNOWN OUTSIDE -***

[Wikipedia](#)

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



SORRY



**ARE YOU FEELING...**

**EMBARASSMENT?**

**FRUSTRATION?**

**ANGER?**

**#TRIBAL\_KNOWLEDGE\_FAIL**







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

# THE PROBLEM





WHAT YOU  
DON'T KNOW...



# LEAKS WILL COST YOU

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

**WHEN DO LEAKS  
HAPPEN?**



YOU'RE FIRED!

I QUIT!



A man and a woman are shaking hands outdoors, smiling. The woman is on the left, wearing a white patterned top and dark pants. The man is on the right, wearing a light blue shirt and a red tie. They are standing in front of a building with string lights hanging from the roof. The background is slightly blurred, showing greenery and a bright sky.

**YAY! PROMOTION!**



# RETIREMENT





OUT SICK! :-)



# VACATION!

# OR NIGHTMARE?



**OR WORSE...**

**PASSED AWAY  
SUDDENLY**



# 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?



# WHY WE DON'T DO IT

- ☐ Not enough time
- ☐ Past failures/apathy
- ☐ Memory fades, urgency fades
- ☐ Team/management resistance
- ☐ Interruptions, lunch
- ☐ **NO SILVER BULLETS**



# TOO MANY HATS!



**THE SOLUTION?**  
**LET'S NOT DO THIS**  
**AGAIN**





**LET'S TIME TRAVEL!**



**IMAGINE...**  
**YOU'RE**  
**SMILING!!??**



My Plan:

**STRATEGY:**



A hand holding a black pen is positioned over an open, cream-colored notebook with a light blue grid pattern. The notebook is resting on a light-colored wooden surface. A semi-transparent dark grey rectangular box is overlaid on the center of the notebook, containing the text 'CREATE A KNOWLEDGE PLAYBOOK' in white, bold, sans-serif capital letters. The text is arranged in three lines: 'CREATE A' on the first line, 'KNOWLEDGE' on the second line, and 'PLAYBOOK' on the third line. The background image shows the hand holding the pen, ready to write, and the open notebook with its grid pages.

# CREATE A KNOWLEDGE PLAYBOOK

# WHAT'S IN IT?

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



# KNOWLEDGE BASE - PICK ONE

- ☐ OneNote or Wiki
- ☐ Found references
- ☐ Troubleshooting notes
- ☐ Pick one, stick with it
- ☐ Do it now



<https://wikimatrix.org/>

# WHY WIKI WORKS

- ✓ Participation is *welcome by default*
- ✓ Information is *more discoverable*
- ✓ New content is *introduced easily*
- ✓ Out-of-date content is *easily updated*
- ✓ Intent is *expressed* before *action*



KNOWLEDGE

WORTH CAPTURING



# STRATEGY: START WITH YOURSELF

Personal capture methods  
turn ideas into action!

# PERSONAL CAPTURE

- ☐ Paper: Notebook or Journal



1979  
Page-a-Day

1944

Property of  
Chester Miller  
Serra Talhada, Pe.  
Endereço Estrangeiro  
Waverly, Ohio  
Estados Unidos de America  
do Norte

"DE LUXE" 1948  
MARCA REGISTRADA

Diary of 1948  
Chester Miller  
Serra Talhada, Pernambuco  
N.º 15 - PAUTADO  
SO PATENTEADO SOB N.º 29.839  
INDÚSTRIA BRASILEIRA

Serra  
Talhada, Pe.  
de  
Miller

SCADO  
839

Aug. 2, 1944 (Wed)

Bro. Ward returned from Alagôa de Baixo and we would have gone to Santa Clara but the truck went early before we could get ready. It rained all day and was cool for dinner.

Aug. 4, 1944 (Fri.)

I arose rather early and began reading, looking for passage to Santa Clara, etc. The truck did not come, it rained nearly all day and a part of the night. We had several times down in the silão and had the weather present in spite of the services. Bro. Ward led the service. Sister Maria (Senhorinha) was in day when I went to the house. She was worried about that I called to day.

DIARY  
1941

# PERSONAL CAPTURE


- ☐ Paper: Notebook or Journal
- ☐ OneNote or EverNote
- ☐ Simple Word docs
- ☐ Whiteboard photos
- ☐ Mind maps (Freeplane!)
- ☐ SnagIt (\$) or Greenshot (free)




**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



**TIP:**

**NAME YOUR LESSONS**

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

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

# USE RETRO RESULTS IN PLANNING

Review past retrospectives after each release and each quarter. Put worthwhile changes on the backlog.



**STRATEGY:  
BLAMELESS  
POSTMORTEMS**

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



U-HAUL

ONE-WAY & IN-TOWN MOVES

U-HAUL

DRIVE A U-HAUL  
LATELY?





**U-HAUL**

ONE-WAY & IN-TOWN MOVES

*Memo's Attie*  
**U-HAUL**

# THE TALE OF TOW-HAUL MODE



L

**TOW  
HAUL**

**WHAT'S THIS  
LIGHT?**



WHAT'S THIS  
BUTTON?



GOOGLE SEARCH: "TOW/HAUL"

SITE:UHAUL.COM

*GOOD SERVICE. TRUCK WORKED OK,  
...THE LIGHT FOR TOW/HAUL WAS ON THE  
ENTIRE TIME.*



***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.***

*THE STAFF WAS FRIENDLY...*

*I WISH THE TOW/HAUL FEATURE*

*WOULD HAVE BEEN EXPLAINED TO ME*

*IN THE BEGINNING.*





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

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

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

**without making me feel stupid**

# ONBOARDING ADVICE

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



# BOOKMARKS ARE A NEWBIE'S BEST FRIEND

- Googling is fun, but it's expensive
- Examples of good bookmarks:
  - SharePoint docs you've found
  - Internal resources
  - Timesheet system
  - Help Desk/Service Requests
- Easy to do, export/import works!

A close-up photograph of a person's hand holding a piece of aged, textured paper that appears to be a map. The hand is positioned on the left side of the frame, with a silver ring visible on the ring finger. The map shows faint, hand-drawn lines and markings. Overlaid on the upper portion of the image is a semi-transparent yellow rectangular box containing the text 'UNDISCOVERED TREASURE' in a bold, black, serif font. Another similar yellow box is located at the bottom of the image, containing the text 'IS WORTHLESS' in the same font style.

**UNDISCOVERED  
TREASURE**

**IS WORTHLESS**

# DEMO YOUR DOCS AND TOOLS

Share what you've created during iteration reviews to help spread the word to the your team. Way to go!



# DISCOVERABILITY

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

# BIG & VISIBLE

Make sure the team has the best chance of seeing need info.

Posters for the win!

**KNOWLEDGE**  
**WORTH SAVING**



**STRATEGY:**

**SCAVENGER HUNT**

**A.K.A**

**"ARCHAEOLOGY"**







# TOUR GUIDES CAN HELP

(IF YOU CAN FIND THEM)





A foggy cemetery with tombstones in the background.

# SHAREPOINT

"Where information goes to die!"

JUST KIDDING (MOSTLY)

**STRATEGY:**

**SCAVENGER HUNT:**

**RAID SHAREPOINT**

**STRATEGY:**

**SCAVENGER HUNT:  
MINE YOUR HARD  
DRIVE**



**STRATEGY:**

**TRANSFORM EMAIL**

First Aid kit?

"I sent out  
an 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!

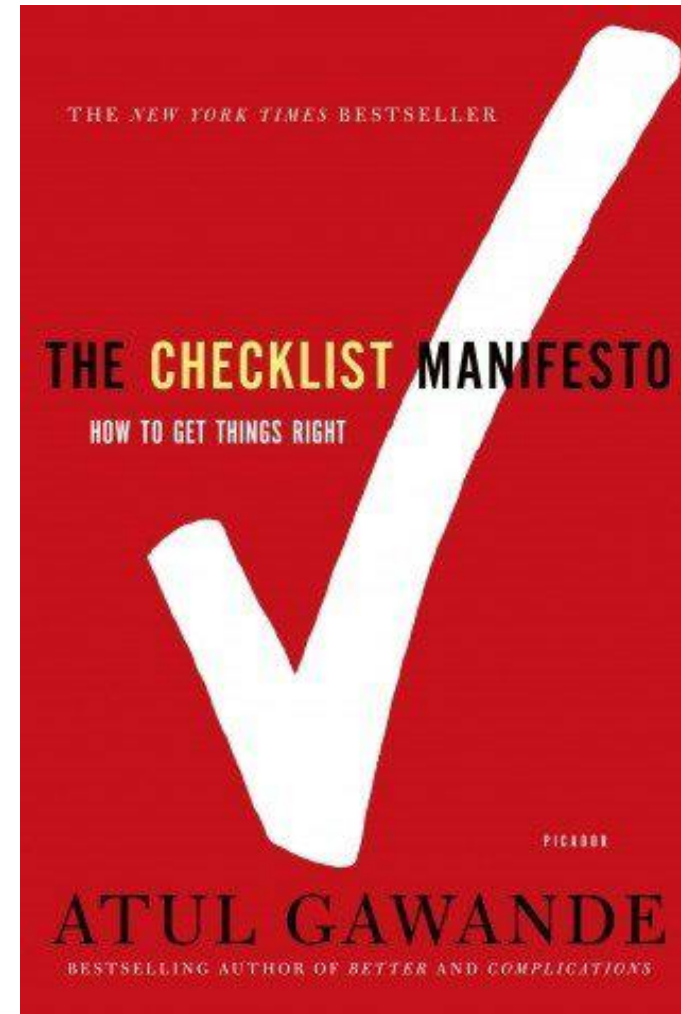
- ☐ Automate common responses and infrequent requests
- ☐ Use email signatures for common copy
- ☐ Send to OneNote can work wonders



# Checklist

**STRATEGY:  
USE CHECKLISTS**

by Atul Gawande



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

TIME 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

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
- Use the right type:
  - Read-Do vs. Do-Confirm

**STRATEGY:**  
**AUTOMATE YOUR**  
**KNOWLEDGE!**

- ✓ Database view that demonstrates a problem
- ✓ Confirms the current state
- ✓ Contains troubleshooting info



# TEMPLATES

- ❑ mailto: links can do more!
    - Include a subject & body
    - Embed them in documents
  - ❑ Code generation
  - ❑ Code snippets, keystrokes, macros
- Common AND infrequent requests

**STRATEGY:**  
**ASK POWERFUL**  
**QUESTIONS**

**STOP LEAVING  
OTHERS OUT!**



**ASK:  
WHO HAVE I  
MISSED?**



Stories **WHAT IS "READY?"** Done

**WHAT IS "DONE?"**

**IS IT "DONE-DONE?"**

**ASK:**  
**WHAT DID WE DO**  
**LAST TIME?**





# LUNCH-AND-LEARN

# LUNCH-AND-LEARN

- ✓ Learn something new
- ✓ Demonstrate your learning
- ✓ Practice your speaking skills
- ✓ Build buy-in for new tech
- ✓ Duh...Lunch!

# INVEST IN OTHERS

- ☐ Blog about it & build an audience
- ☐ Release examples on Github
- ☐ Answer Q's on Stack Overflow
- ☐ Use social media to help seekers





# TDD + PAIR PROGRAMMING

Writing tests together increases  
your bus number..*fast!*

# PULL REQUESTS + CODE REVIEWS

GitHub Enterprise & Azure DevOps  
can enforce a pull request/code  
review model. Great idea!

# NOW WHAT?

- ☐ Start now
- ☐ Start small
- ☐ Start with yourself
- ☐ Up your game!
- ☐ Make something great
- ☐ Share with others
- ☐ Build momentum



# ATTITUDE?

18 Then I hated all my labor in which I had toiled under the sun, because I must **LEAVE IT TO THE MAN WHO WILL COME AFTER ME.**

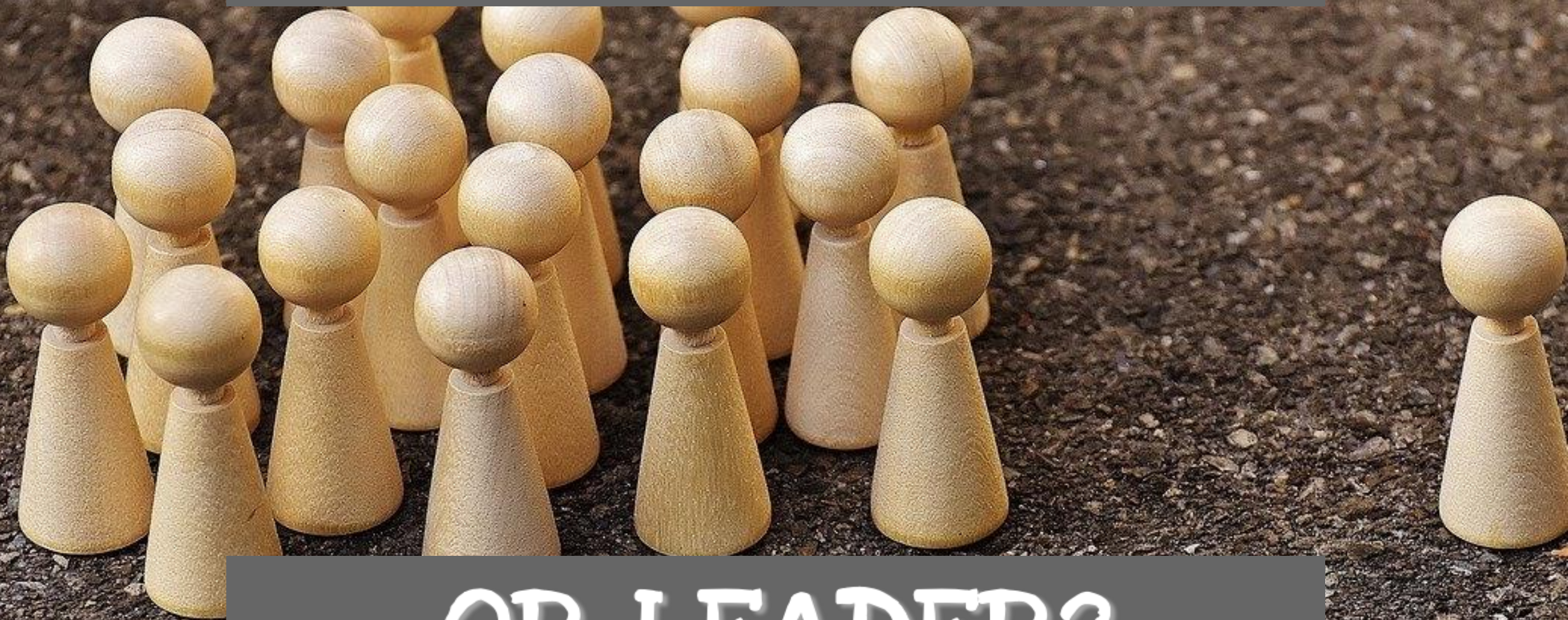
19 And **WHO KNOWS WHETHER HE WILL BE WISE OR A FOOL? YET HE WILL RULE OVER ALL MY LABOR** ...This also is *vanity*. .

King Solomon - Ecclesiastes 2:18-19 (NKJV)

**STOP MAKING  
EXCUSES!**



LONER?



OR LEADER?



# LEAVE IT BETTER!

Try to **LEAVE THIS WORLD**

**A LITTLE BETTER THAN YOU FOUND IT**

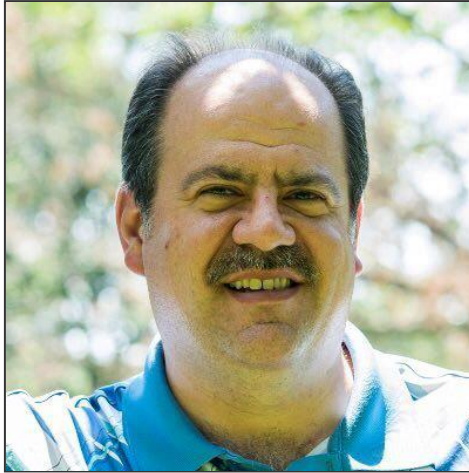
and, when your turn comes to die, you can  
die happy in feeling that at any rate

**YOU HAVE NOT WASTED YOUR TIME**

but have **DONE YOUR BEST.**

Robert Baden-Powell

Slides at: **KNOWLEDGEPLAYBOOK.COM**



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

