



Team Knowledge Management Discovery Report

April 2020

Dear Team,

Thank you for voicing our need for stronger knowledge management to support our current and future teammates and our company's growth. We are grateful for your commitment to diving into our Team Knowledge Sprint to jumpstart this work together!

We share your vision of working *smarter*. That's how we get to focus on the work that is most energizing to us and makes the greatest impact. Let's do it.

- Kayleigh, Eva and Rafa

Learnings from our Knowledge Sprint

Pain Points

1. Our knowledge lives in many **different places and formats**.
2. It's hard to **know where to start** when there's a lot to tackle and priorities are unclear.
3. We're **trying to name guidelines** on how to do this work, while simultaneously doing the work.
4. It's hard to **take the abstract** from our brains and put it down on paper. Especially all in one sitting.

Strengths

1. We've collectively identified a knowledge management gap and are **working together** to address it.
 2. Our **team is extremely knowledgeable** about our clients and how we do our work.
 3. We have a **strong sense of where** our important documents live to centralize and organize.
 4. We can tackle this work by **practicing what we preach** as internal consultants.
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Where We're Going Next

Big Rock

Launch our Knowledge Tool MVP in Guru with key existing team knowledge.

Medium Rocks

Since Our Sprint	1. Select a Knowledge tool - we've assessed a few including Spekit + Quip. Guru is our tool!
	2. Tap Squad + Ops team for build out and launch of our Guru MVP.
By Mid-May	3. Migrate our Ops and Consulting Guides into Guru (deprecate Google Sites).
	4. Document our policies & procedures for how we manage and expand our knowledge in Guru.
	5. Listen to feedback from our team on the usability of our setup.
	6. Train & support our team to use Guru in our day-to-day work.
May - August	7. Identify gaps of our current knowledge and prioritize.
	8. Create new content to fill gaps identified as the highest priority.
August +	9. Maintain and grow content as prioritized on a quarterly basis.

Our Approach

- **Project Management:** Kayleigh is operationalizing our work all in [TaskRay](#)!
- **Meeting Cadence:** Kayleigh and Eva meet on a weekly basis to align and support on next steps.
- **Our North Star:** Check out our visual below for the MVP guidelines by which we are currently *flying*.

	OpenTent Knowledge Management				
Guru Collection	Field Guide			Client Guide	Ops Guide
Guru Board	Tools + Tech Approaches	Consulting Approaches	Project Management	Individual Clients	Ops Topics
Lead	Eva	Kayleigh	Kayleigh	Eva	Sam
Consulted	Engineers	Field Team	Project Managers	Client Team	Ops Team
Content	Best practices for	How we work	How we deliver	What we've	How our team

Framing	selecting, using and learning tools	with our clients (frameworks and attitudes)	high-quality work on-time	learned and built with our clients	operates (resources to guide employees)
Content Examples	<i>Online Forms Email Marketing Data Importing Data Hygiene Quality Assurance User Testing Automation Code</i>	<i>Time Management Estimating Points Documentation Leading discovery Implementing User Training User Adoption Client Support Friday Hikes</i>	<i>TaskRay Roadmaps Meetings Project cycles Quarterly Review Campsite</i>	<i>Technical docs Process docs Project deliverables User guides Alignment meetings Roadmaps Learning resources</i>	<i>Human Resources Growth Finance Communication Internal Tools</i>

Please add comments above with your thoughts + questions! Thank you!