



# **TRIBAL KNOWLEDGE**

in

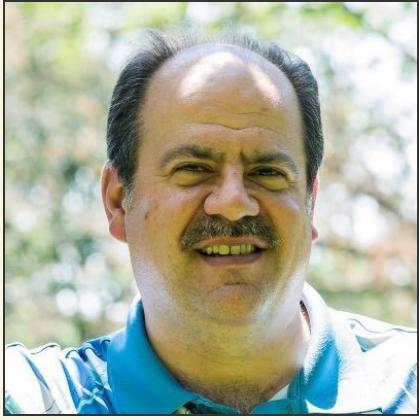
# **AGILE TEAMS**

Jeffrey A. Miller - @xagronaut

**KNOWLEDGEPLAYBOOK.COM**

# JEFFREY A. MILLER

## SENIOR CONSULTANT

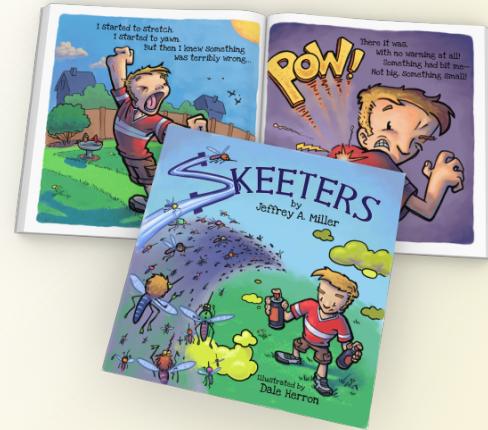


@xagronaut

[linkedin.com/in/jamiller](https://www.linkedin.com/in/jamiller)

[jmiller@manifestcorp.com](mailto:jmiller@manifestcorp.com)

- Full stack Microsoft developer
- Certified Neo4j developer
- 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

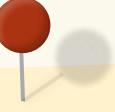


**ARE YOU FEELING...**

**EMBARRASSMENT?**

**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**

WHATS IN THE WAY?

**THE RESULT?**

**ERODING TRUST**

**WHEN DO LEAKS  
HAPPEN?**

A composite image featuring two men in business attire performing a synchronized high kick. The man on the left wears a dark suit, white shirt, and red tie, and is wearing glasses. The man on the right wears a light-colored dress shirt, dark tie, and dark trousers. They are both captured mid-kick against a plain white background.

I QUIT!

A photograph of a woman with dark hair and a man with a full, reddish-brown beard shaking hands. They are both smiling. The woman is wearing a white blouse with small black dots and dark trousers. The man is wearing a light blue shirt and a red tie. They are outdoors, with a white building and some greenery in the background.

YAY! PROMOTION!



# RETIREMENT

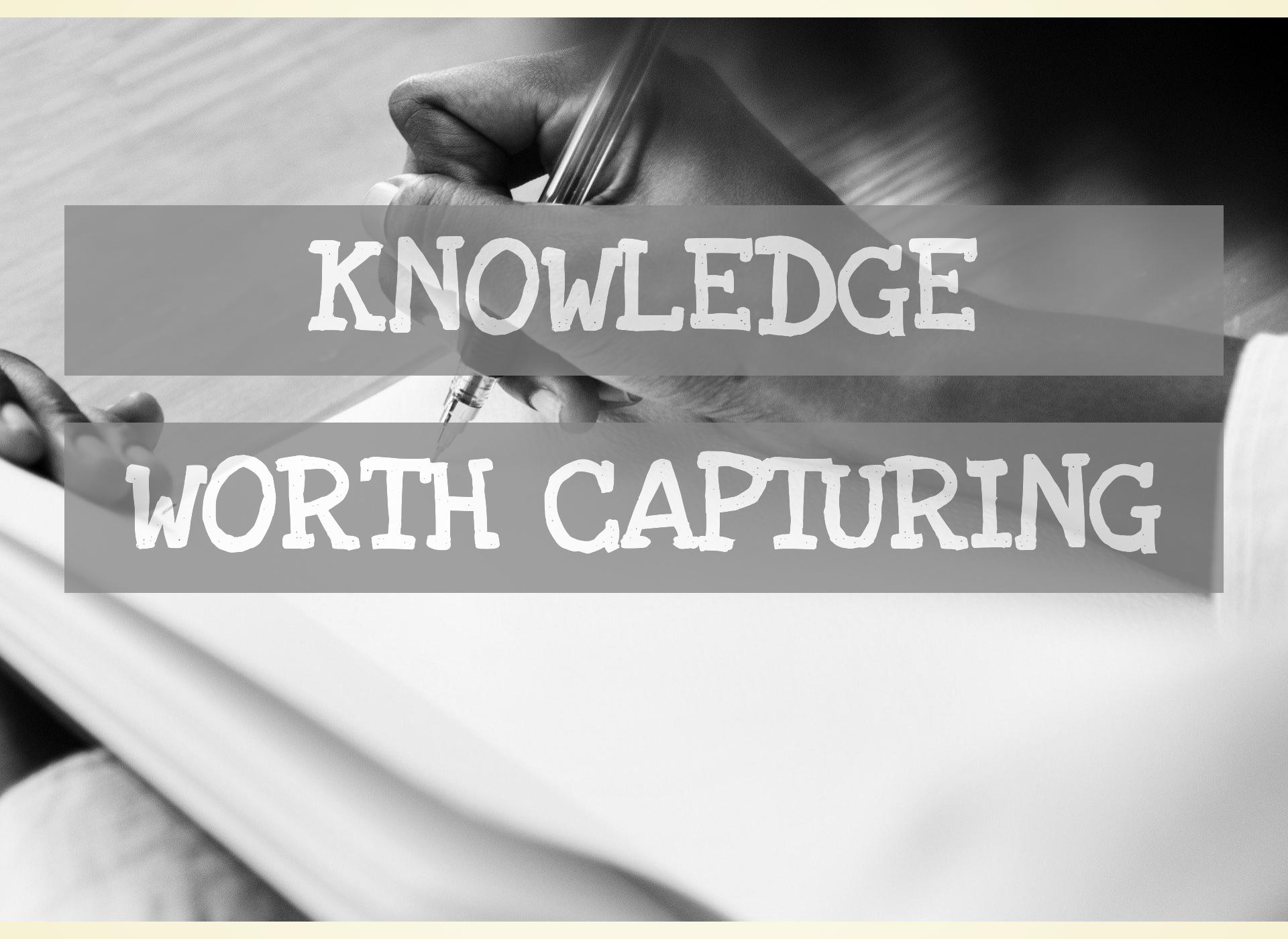


OUT SICK! :-(|

**OR WORSE...**

**PASSED AWAY**

**SUDDENLY**



**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**

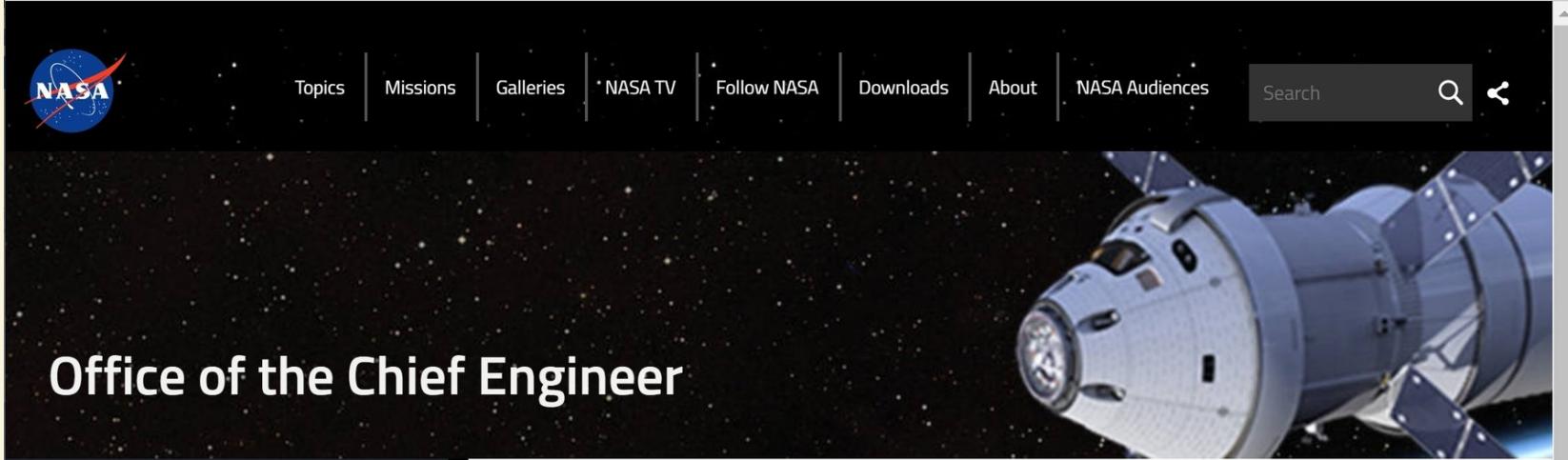
**RETROSPECTIVES**

**COUNT**

# NASA LESSONS LEARNED

nasa.gov/offices/oce/functions/lessons/index.html

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## 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 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



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

# 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)



# 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?**

A white U-Haul truck with red stripes and a red tow-haul mode truck are parked at a gas station. The U-Haul truck has "UHAUL" and "ONE-WAY & IN-TOWN MOVES" printed on it. The tow-haul mode truck has "CLOTH SEAT • A/C • AUTOMATIC" and "UNDER LOAD CROSS" printed on its side. The scene is set under a clear blue sky.

UHAUL

ONE-WAY & IN-TOWN MOVES

Move Faster  
UHAUL

RIGHT EQUIPMENT LOWEST COST

# THE TALE OF TOW-HAUL MODE



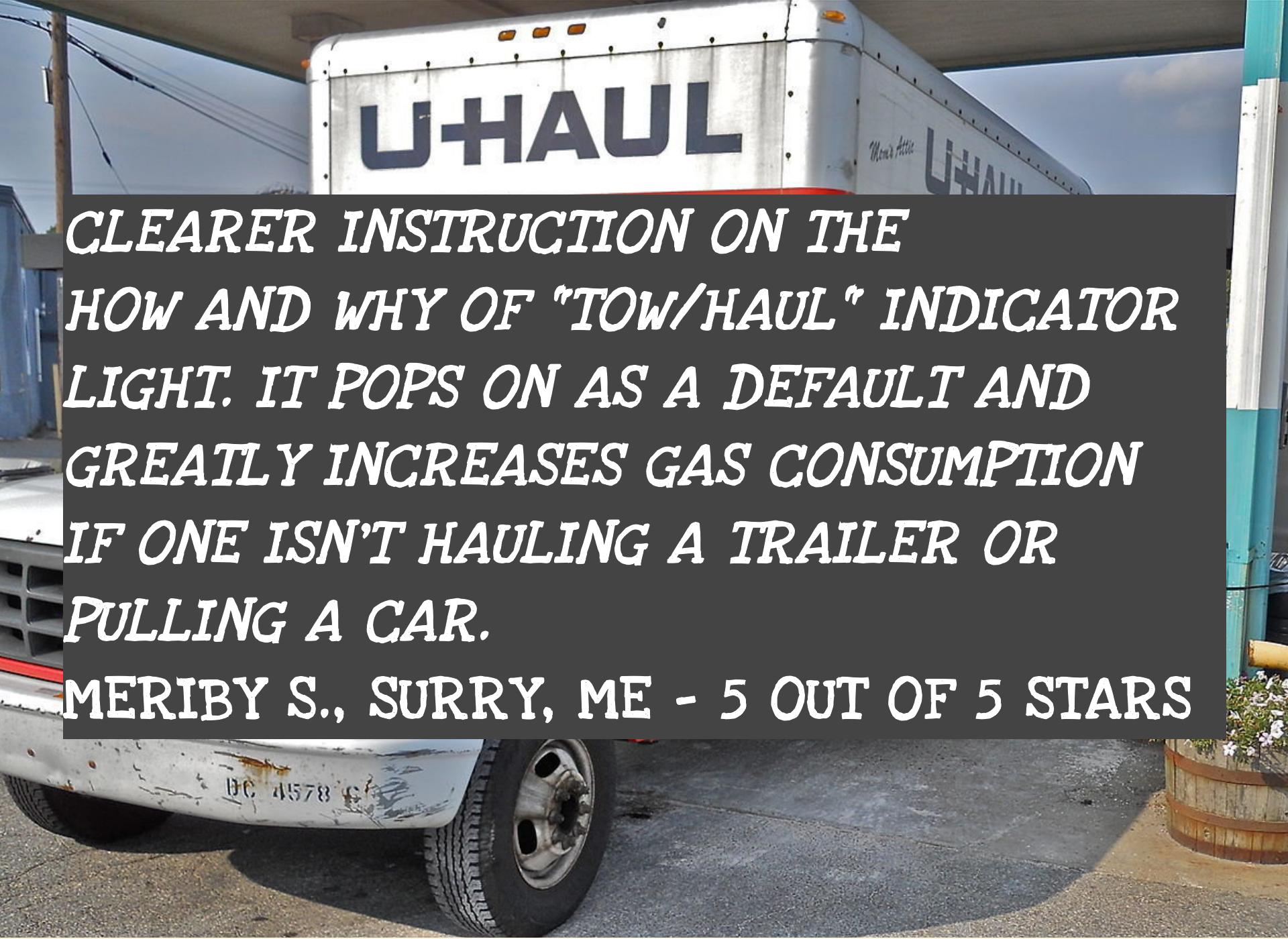
**TOW  
HAUL**

**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*





**UHAUL**

*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**

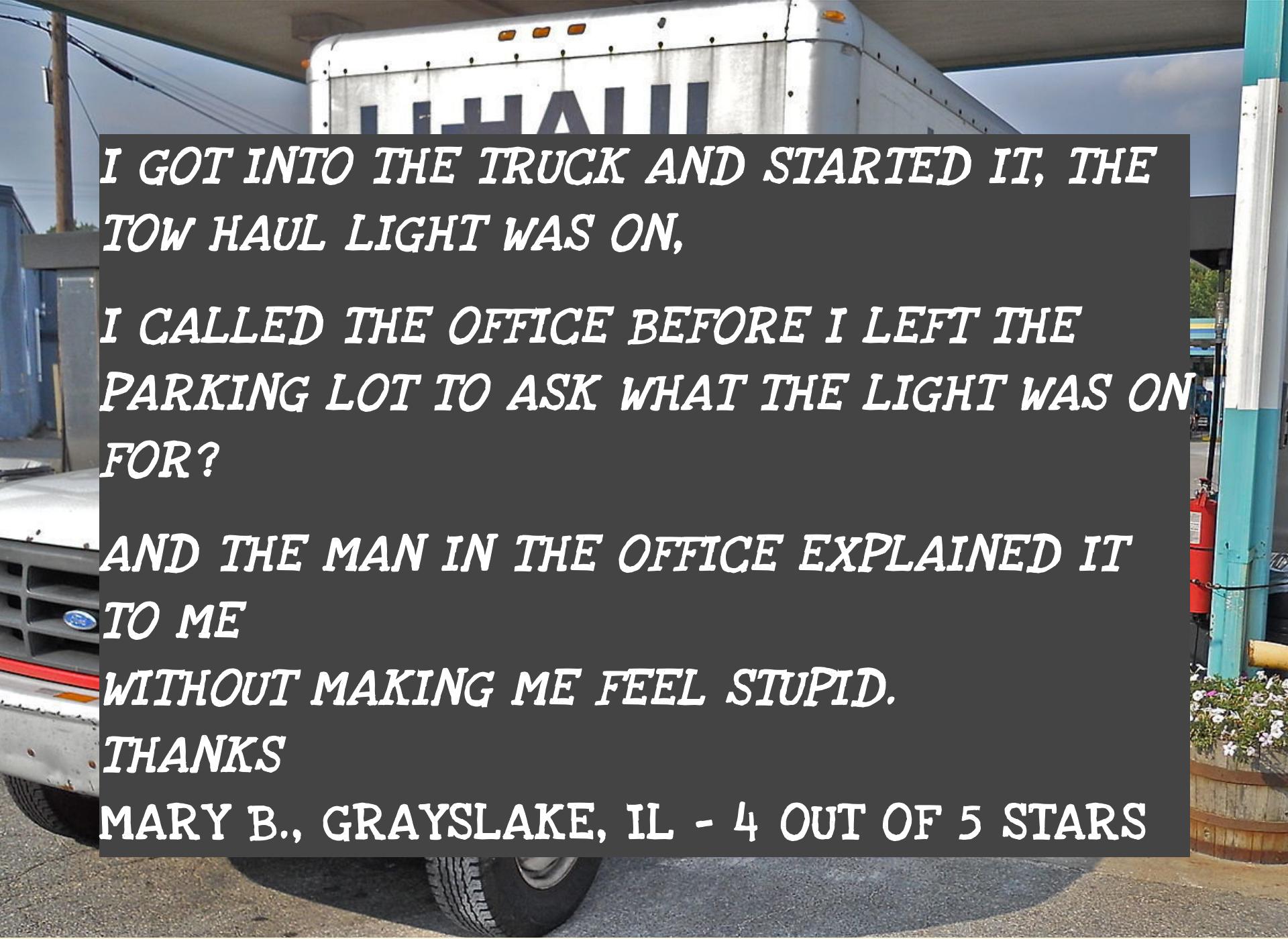
A white U-Haul moving truck is shown from a side-front angle. The word "UHAUL" is printed in large, bold, black letters on the side of the cab. Below the cab, a red horizontal stripe features the words "ONE-WAY & IN-TOWN MOVES" in white capital letters. The rear of the truck also has "UHAUL" printed on it.

**UHAUL**

ONE-WAY & IN-TOWN MOVES

*Move Again*  
**UHAUL**

*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*

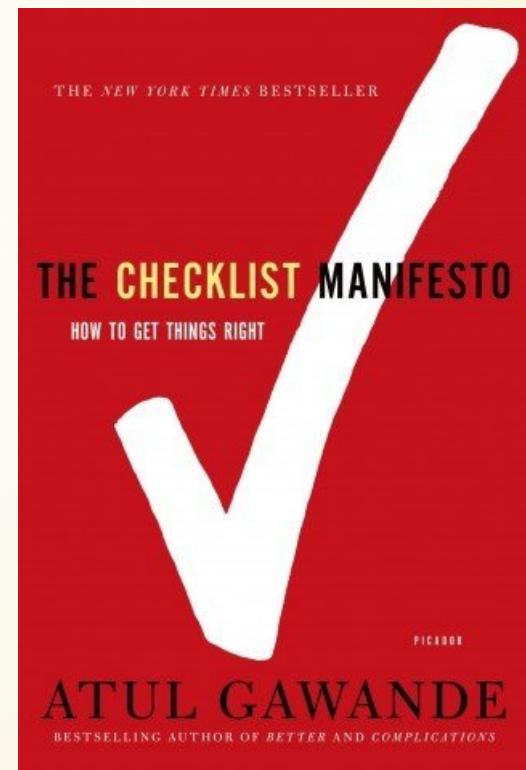
# ONBOARDING ADVICE

- 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





#### The induction of anaesthesia

Before skin incision

#### **Before patient leaves operating room**

WIN

PATIENT HAS CONFIRMED

- IDENTITY
  - SITE
  - PROCEDURE
  - CONSENT

SITE MARKER/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

- CONFIRM ALL TEAM MEMBERS HAVE INTRODUCED THEMSELVES BY NAME AND ROLE
  - SURGEON, ANAESTHESIA PROFESSIONAL AND NURSE VERBALLY CONFIRM
    - PATIENT
    - SITE
    - PROCEDURE

#### **ANTICIPATED CRITICAL EVENTS**

- SURGEON REVIEWS: WHAT ARE THE CRITICAL OR UNEXPECTED STEPS, OPERATIVE DURATION, ANTICIPATED BLOOD LOSS?
  - ANAESTHESIA TEAM REVIEWS: ARE THERE ANY PATIENT-SPECIFIC CONCERNs?
  - 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?

- YES  
 NOT APPLICABLE

#### **IS ESSENTIAL IMAGING DISPLAYED?**

- YES  
 NOT APPLICABLE

**SIGN OUT**

NURSE VERBALLY CONFIRMS WITH THE TEAM:

- THE NAME OF THE PROCEDURE RECORD
  - THAT INSTRUMENT, SPONGE AND NEEDLE COUNTS ARE CORRECT (OR NOT APPLICABLE)
  - HOW THE SPECIMEN IS LABELLED (INCLUDING PATIENT NAME)
  - WHETHER THERE ARE ANY EQUIPMENT PROBLEMS TO BE ADDRESSED
  - SURGEON, ANAESTHESIA PROFESSIONAL AND NURSE REVIEW THE KEY CONCERN 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**



# STRATEGY:

# CREATE A PLAYBOOK

# WHAT'S IN IT?

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

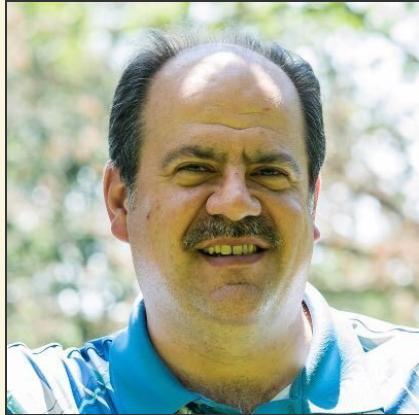
**QUESTIONS?**

# THANK YOU

Slides at:

KNOWLEDGEPLAYBOOK.COM

## JEFFREY A. MILLER



@xagronaut

[linkedin.com/in/jamiller](https://www.linkedin.com/in/jamiller)

[jmiller@manifestcorp.com](mailto:jmiller@manifestcorp.com)

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

