

Leveraging **Microsoft Tools** to empower your organization's 365 Knowledge Management Strategy



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April 9	April 10	April 11
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Workshops	Sessions	Sessions
	Prizes	Prizes
	Party	

Schedule

### **About Me**

#### @vcmonkey

https://www.highmonkey.com/blog

- Originally from Alaska
- Celebrating 25 years of business
- Been reimagining websites since 1998
- Been digitizing the workplace since 2001
- User Experience Aficionado







### HOW PEOPLE THINK YOUR KM WORKS



### HOW YOUR KM REALLY WORKS









### What is Knowledge Management?



### Knowledge management in goals

- Improve access to crossorganizational knowledge
- Capture knowledge before its
   lost
  - There is a soft value
  - There is a \$\$ value
- Enable and improve decision making
- Onboard more efficiently



### Knowledge management as a practice

**Knowledge management** (KM) is the process of identifying, organizing, storing and disseminating information within an organization



### Knowledge management in reality

- Too many cooks efforts are fragmented
- Hurry up and wait no clear direction
- Eat the whole cake first trying to do so much, it never starts
- **Oops we lost that** recognized after its too late



••••

# MANAGING KNOVLEDGE



# **Knowledge planning**

- Understanding your knowledge
  - Search analytics / feedback
  - Crowd sourcing
  - Discovery process
  - Good knowledge types
    - HR
    - benefits
    - employee manual topics
    - org wide processes
    - departments
    - software / tech / equipment info / troubleshooting
    - strategic initiatives

### **Knowledge in 365**



# **Strategies for success**

- Good, clean content
- Information organization is still important
- De-duplication how can AI be sure if you are not
- Using sensitivity labels & metadata exclude more than include



# Knowledge through Microsoft Secrch?



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# Search as an ecosystem



# Search for people

- People suggestions across full Office 365 and LinkedIn profiles
- Find based on profile and what you've been doing
- Learn from where you've been, what you've talked about and who you know
- Full people-centric search
   **rolling out**



### Search for answers

#### Types

- Acronyms
- Bookmarks
- Questions & answers
- Locations
- Topics

Currently only available in certain locations

- Office.com
- Bing
- SharePoint organization-level search
- Teams Acronyms only



### acronyms

#### PROS

- Common issue in many organizations
- Help with consistent
   understanding of terminology

#### CONS

- Relies heavily on sentence
   structure
- Doesn't handle similar uses well



### bookmarks

#### PROS

- Quick action items
- Timed release
- Alternative ways to find

#### CONS

• May overuse / may not be sure when to use



### Q&A

#### PROS

- Complete explanations
- Link out to additional resources

#### CONS

- Must understand the way people look for answers
- Adds additional layer in change management



# locations

#### PROS

- Find where offices are located
- Help out new employees and infrequent visits
- Ability to get directions

#### CONS

Have to be specific in search.
 Will need to educate



### **Answers – when to use?**

Answers	Use
Acronyms	Organization jargon, abbreviations
Bookmarks	Need to get people somewhere Great uses • LOB systems • Important forms • External resources
Questions & answers	Providing a complete answer inside of search. Reduce end user need to navigate through search results to find what is needed Great uses • HR policies • Important dates / events • New employee onboarding • Change communication

# **Roadmap items**

Roadmap item	Potential Launch
Customize Verticals <ul> <li>Create custom verticals and filters based on business cases</li> </ul>	December 2023 (still rolling out)
Filter by content sources in 'All' Vertical	April 2024



### Knowledge through VIVA and SharePoint?



# SharePoint

- The OG
- Organizational structure
- Metadata
- Company vs. personal storage
- Knowledge centers
  - Keep away from general knowledge

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## **VIVA Learning**

- Learning paths not just tied to employee compliance
  - How to's
- Focus on continuous improvement not company initiatives



# **VIVA Engage**

- 'Engaging' Communities / teams
- Storylines
- Viva Engage Knowledge services (\$\$)
  - Answers connect with SMEs
  - Discover Topics



### VIVA – Other

- Viva Connections
- Viva Amplify
- Viva Insights
- Viva Goals
- Viva Glint / Pulse



# **Roadmap items**

Roadmap item	Potential Launch
Follow a Topic	June 2024
Ability to recommend courses to an existing group (Viva Learning)	June 2024

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Knowledge through CoPilot



### CoPilot – find the knowledge

- Use CoPilot to help you better find and understand the knowledge you need
  - Where can I find the latest company calendar?
  - What team is responsible for 'x' process?
  - Who has knowledge around 'y' product?

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### CoPilot – create the knowledge

- Use CoPilot to help you better find and understand your knowledge
  - Summarize our 'x' practices?
  - What is our current 'y' policy?
    - Identify the location of the information used to create the answer
  - Give a detailed breakdown around 'z' department's latest initiatives
  - What are the top 5 things our people are looking to learn more about
- Create knowledge pages with CoPilot for SharePoint

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### CoPilot – cautions

- Doesn't always get context
- Answers change by phrasing
- Doesn't really understand the correct source
- Can give different answers to the same question? - need to test
- Only as good as the content it is using to be good
- Much better in the apps and app specific questions and functions



# **Roadmap items**

Roadmap item	Potential Launch
CoPilot in Stream	April 2024
CoPilot in SharePoint	May 2024
CoPilot in Viva Learning	September 2024







## **QUESTIONS?**

Virgil Carroll virgil@highmonkey.com www.highmonkey.com

