THE KNOWLEDGE SHARING PLATFORM FOR PROFESSIONAL SERVICES FIRMS

Transform proven methods, expert knowledge and best practices trapped inside your firm into interactive, online experiences for your staff, clients and prospects. Fast, effective and low cost.
A NEW APPROACH TO SHARING EXPERTISE AND GREAT OUTCOMES

Your organisation is filled with great ideas, proven methods, critical expertise and unique processes. Yet all this valuable knowledge is often isolated and trapped among just a few of your staff. Your organisation has the answers, but can’t capture or share them.

Imagine if you could. Imagine the impact of using all that expertise to create great outcomes across your entire organisation. What if you could truly leverage the best ideas in your organisation to train your staff, engage with clients and attract new prospects?

That’s Tribal Habits.

TRIBAL HABITS IN 60 SECONDS

 Tribal Habits is a knowledge sharing platform for professional services firms that view capturing and sharing internal knowledge as a strategic advantage.

 Your firm establishes a unique, secure, branded online portal which hosts your organisation’s expert content, user interactions and rich reporting.

 Experts in your organisation can capture their knowledge via an easy-to-use, guided process. Or use our range of ready-made topics to accelerate sharing.

 Tribal Habits automatically takes care of user interactions, notifications, navigation, formatting and enrolments. You can just focus on your content.

$ Ultimately, you create interactive online experiences, in your branding, which can be used for staff training, client engagement or prospect marketing.
TRANSFORM PROVEN EXPERTISE INTO VALUABLE ONLINE EXPERIENCES

Staff Induction
Develop consistent staff training, available in any location and easy to update. Accelerate the productivity and results of new staff. Ensure consistency across the business.

Client Education
Share expertise with your clients as a value-added, or revenue generating, service. Cross-sell ideas or promote products and services. On-board new clients to reduce service costs.

Prospect Marketing
Offer engaging, online experiences to new leads, while building brand recognition and capturing data for sales teams. Turn your expertise into a competitive advantage.

Client Preparation
Improve client interactions with interactive meeting preparation and service/product education. Engage clients in two-way data collection - share your knowledge while capturing their feedback.

Compliance Training
Rapidly create professional development or compliance training on any topic, including online and offline assessments. Monitor versions, track time or points and automate reminders.

Operational Efficiency
Instil standard processes and ensure everyone (staff and clients) are aware of all the tips and tricks to work faster and smarter. Make all your best practices into common practices.

Thought Leadership
Turn passive blogs or whitepapers into interactive, professional development topics for clients and prospects. Take internal training topics and make them available externally.
Sage is our knowledge AI and is here to make your life easier.

Sage guides your experts to frame their thoughts and organise their knowledge as online content. Sage then transforms that content into beautiful, interactive online experiences. Sage helps anyone create valuable expert content.

You can interact with Sage in a conversation - ask questions, seek advice and obtain feedback. Ultimately, Sage is your coach, guide and friend through-out Tribal Habits.

Steve, what would be a good structure for your topic?

Hey Sage, I am thinking of using a series of ‘steps’.

Great. Steps work best when you are discussing a process...

Steve, let’s now create titles for each of your ‘steps’.

Hey Sage, I am a bit stuck trying to write these titles.

No worries. Let’s get you unstuck. Here’s tip on titles...

Hey Sage, what do you think of the content in this step?

I think this step needs work. There’s only 2 sections so far.

Hey Sage, tell me more about ‘sections’.

Hey Sage, what do you think of the content in this step?

I think this step needs work. There’s only 2 sections so far.

Hey Sage, I need some inspiration creating my steps.

Sure Steve. When your step consists of smaller tasks...

Thanks Sage, I am fine for now.
LET’S ASK SAGE SOME QUESTIONS WHICH MIGHT BE ON YOUR MIND

How long does it take to create content or a topic?
You can set up a topic in the morning, work on it during the day, and complete it in the afternoon. Simple factual topics can be done in 30 minutes, or you can dive into complex topics to your heart’s content. Alternatively, your staff can create content when their workload permits, in short sessions over a few weeks. Throughout the entire process, Sage guides your experts on what to do next, to ensure they use their time efficiently.

How can internal experts capture their knowledge into a topic?
Sage guides your experts via a ‘building block’ content editor. This allows Sage to understand what content is being added and to take control of formatting, layout and typography. The content editor includes sections, text, columns, images, videos, polls and more. Sage tracks the amount and type of content, and provides feedback on content within a topic. Content blocks can be moved, deleted and added to quickly reshape ideas. Live preview is available as you go.

How easy is it to update knowledge and content?
It’s simple. Any change is instantly reflected in the online topics. Fix spelling mistakes, replace out-dated images or completely recreate any aspect of knowledge in that topic...at no additional cost and it’s immediately updated for all users. As your organisation grows, you can add new topics, delete old topics or update existing topics to reflect the latest knowledge, processes and information. Instantly. Track version history for compliance topics, or copy and update existing topics for the latest industry or market changes.

Can Tribal Habits help create content for us?
Yes. First, we have a range of ready-made topics in our Marketplace. In most plans, enrolments in these topics is free. Our ready-made topics appear in your branding and adapt to your firm by capturing additional ideas from your staff. Second, we can transform your existing content - workbooks, documents, slides, training manuals - into Tribal Habits topics on your behalf. It’s fast and very low cost. You will only need to review and finalise to have totally customised topics.

Is Tribal Habits a training platform, client management platform or marketing platform?
It can do all three. Tribal Habits is about capturing and sharing knowledge. This might be in the form of customised training for your staff, allowing them to share best practices or learn about unique software or documents in your firm. However, you can also share knowledge in topics for clients, such as a meeting preparation topic for common types of client meetings. You can also offer topics to the public, allowing new prospects to sign-up and access your content.

How much does Tribal Habits cost?
Tribal Habits is a subscription platform based on monthly active users. You can either pay each month, based on actual users each month, or pay annually in advance for a discount, based on expected number of monthly users over a 12 month period.
HAVE A **RAPIDLY GROWING FIRM WITH MANY NEW STAFF?**

When your firm is rapidly growing, staff induction becomes a big problem. Without a centralised knowledge sharing platform, new staff must be individually inducted by various existing staff. This is inefficient and time consuming, and the quality of induction is variable and impossible to measure.

Tribal Habits allows you to build custom induction programs ‘once and right’. Your internal staff can capture knowledge once, and its then available 24/7 to new staff in a consistent and measurable way. It helps quickly turn new staff into productive staff. From company values, sales processes, internal software, unique processes and custom documents. A complete custom training program – any topic, any time, any location.

**HAVE NO TRAINING STAFF BUT NEED TO IMPROVE INTERNAL TRAINING?**

While many professional services firms would like a dedicated training resource, this isn’t always possible, especially for smaller or mid-tier firms. As a result, staff training becomes focused on compulsory compliance matters with personal development, staff induction or strategic training overlooked.

Tribal Habits becomes your ‘training team in a box’. First, it enables any internal expert to create great training for your firm. Second, with a range of automated enrolment and notification processes, you can adopt a ‘set and forget’ approach to implementing training. In effect, it empowers your staff to create, share and manage their knowledge and training. And our ready-made Marketplace topics are the final touch for instant, hassle free training!

**HAVE A LEARNING MANAGEMENT SYSTEM BUT NO CONTENT?**

If your firm is large enough to have a learning management system (LMS), then you may have realised that the #1 problem with an LMS is a lack of content. If you have an LMS which has a topic marketplace, you might find the topics are unbranded, generic and unable to adapt to your firm. And external customised eLearning is extremely expensive.

Tribal Habits can firstly provide content to your LMS via deep-linked topics. Your staff can still login to your LMS to find topics, but then be redirected into Tribal Habits for the actual training. It’s the best of both worlds. Topics in Tribal Habits are also branded to your firm, contain interactions to allow your staff to customise ideas to your firm, and can seamlessly utilise your topics and our Marketplace topics together for a consistent user experience.
HAVE STAFF IN **MULTIPLE LOCATIONS WITH DIFFERENT STANDARDS?**

Once you have staff in multiple locations, you have an immediate knowledge sharing problem – distance. This distance creates inconsistencies in your standards. Suddenly, each location has their own different way of doing things. Unhealthy competition can occur, or new best practices can be isolated and stuck in internal silos.

Tribal Habits breaks down internal knowledge sharing barriers. As a secure, online platform, your staff (and clients) can access knowledge and topics from any location. Teams in one office can learn from, and share with, teams in any office. Individuals in specific roles or new staff in remote locations, who might be isolated from headquarters, can access the same topics and knowledge. Work from the ‘one source of truth’ for processes and standards.

HAVE YOUR **OWN BEST PRACTICES BUT NO WAY TO TRANSFER THEM?**

Over time, your staff are developing your best practices. They are learning through experience to develop the most efficient ways and most effective skills to make your firm perform better. But those best practices exist only in the minds of your staff. If those staff leave, those best practices leave too. Unless that knowledge has been captured.

Tribal Habits makes it easy to capture internal best practices. Those best practices can then live on without their original internal experts. They can also be easily updated to ensure they stay current. Most importantly, these best practices can be shared in a way which is meaningful, engaging and practical – unlike sharing best practices through passive, boring and untrackable PDF documents or Power Point slide decks.

HAVE A **COLLABORATIVE CULTURE OR WANT TO BUILD INNOVATION?**

Many professional services firms have cultures which favour the ‘expert’ over the team. Internal expertise is seen as powerful, and possibly withheld to assist personal gain. Unhealthy competition can exist between teams or locations, or individuals are reluctant to share their expertise.

Tribal Habits helps break down the ‘expert’ culture and create a culture of collaboration, innovation and sharing. It provides a portal which rewards and promotes staff who want to share their expertise. It automatically generates opportunities for peer learning, success sharing and best practice exchange. It can be a critical tool to foster a culture (and KPI system) of knowledge, learning and innovation.
Challenge
Mercer realised that the role of emotions in effective financial decision making was critical to driving individual effectiveness and successful client outcomes. So they needed a way to upskill 60 financial advisers located around Australia with an understanding of complex skills in emotional intelligence, behavioural finance and relationship management. Ensuring real behavioural change in these areas would require advisers to not only acquire new knowledge, but see the benefit in developing new and contemporary skills when it comes to client engagement.

Solution
Mercer tapped directly into its internal expertise to create a series of Tribal Habits topics, and slowly and carefully take their advisers on a journey into behavioural finance. The topics included video interviews with internal experts, scenario analysis and assessments, and several on-the-job activities.

Additional topics were also used to prepare advisers for face-to-face workshops, and then to capture and summarise those workshops for new advisers.

Outcome
A single L&D manager was able to use Tribal Habits to coordinate internal experts to develop and deliver the entire program – 10 hours on online learning plus two days of workshops – to over 60 advisers around Australia in under four months! This achievement was successful without any external development costs other than the Tribal Habits subscription. Over 3,000 contributions of knowledge and on-the-job outcomes were captured from advisers. Across the Tribal Habits topics, 91% of participants rated the topics as high quality in usefulness of content, 70% felt it directly improved client service, 68% said it improved team morale and 95% found knowledge they were seeking or new knowledge which was valuable on-the-job.
Cardno is a professional infrastructure and environmental services company, with expertise in the development and improvement of physical and social infrastructure for communities around the world. They used Tribal Habits to boost business development skills with over 100 Engineers.

**Challenge**

Cardno’s engineers collectively represented significant client management and business development expertise. However, with engineers located in dozens of cities, expertise in finding, winning and implementing new projects was not always visible and shared. Cardno needed a way to engage with a diverse group of participants, dealing with multiple locations, clients and cultures, to capture business development expertise and drive growth opportunities.

**Solution**

Tribal Habits was chosen to provide an initial Business Development Academy, consisting of 10 topics across a range of key growth areas – building trust, developing proposals, managing productivity and more. Subject Matter Experts from across the business were empowered to contribute their expertise.

This ensured content was relevant and engaging. The entire program was developed in under two months and delivered globally over a further two months to over 100 engineers.

**Outcome**

Participants were able to select topics from the Academy which suited their learning needs. As a result, 91% found new skills on-the-job, 82% said the program helped generate new business (even within the initial roll-out!) and 95% found the learning outcomes they were seeking. Following this roll-out, the Academy has been expanded with additional topics and on-going delivery through the US and Australia. Local management and subject matter experts are now able to host knowledge sharing events as follow-up to these modules, providing an completely internally driven blended-learning experience.
Select any key topic
Target areas of staff performance directly related to key strategic goals. Need to reduce expenses? Then focus on process improvements. Need to grow revenue? Then share proven sales skills. Create your own topics, use our ready-made topic Marketplace or have us transform existing content into topics.

Tap into your experts
Engage your internal experts directly in the creation of content. Use top client advisers, experienced operational staff or recognised technical experts. Unlock the talent already in your firm without incurring any additional cost.

Rapidly capture knowledge
Utilise Tribal Habits’ guided content creation processes, driven by our AI Sage, to enable high quality content from any expert staff. Sage helps any subject matter expert in your firm create great knowledge sharing content.

Access ready-made content
Tribal Habits has a range of ready-made topics in our Marketplace, all designed especially for professionals. Use these topics to accelerate a training roll-out or fill gaps in your firm’s internal expertise. All Marketplace topics come in your branding, so they look and feel like your own topics.

Transform existing content
Tribal Habits can also transform existing internal content. Our expert creators can take your slides or PDF documents and rapidly create a draft topic for your staff to finalise. All at a cost far lower than traditional customised elearning.
Beautiful, branded topics

Watch as your internal content is transformed—automatically—into beautiful, modern and engaging online experiences in your firm’s branding. Videos, images, narrated slides, polls, quizzes, Q&A and more.

Effective knowledge transfer

Tribal Habits topics are designed to engage, educate and assist users to genuinely acquire new knowledge. Topics are intuitive to use, with a wide range of built-in interactions designed to boost knowledge retention. Users can also access personal journals for each topic, which automatically capture outcomes, insights and ideas for offline use.

Social and peer learning

Each topic can include built-in social and peer based learning. You can enable features to allow users to share results, compare outcomes and contribute new expertise into topics. Users can reflect on lessons from others and share in the successes of their peers.

Online and offline activity

All Tribal Habits topics can use a range of built-in activities to drive behavioural change. Professional Development and compliance topics can utilise quizzes and assessments. Topics can include on-the-job activities to be completed offline, including tracking, reminders and reporting of results to stakeholders and managers.

Share with clients and leads

Invite your clients into your Tribal Habits portal to provide client on-boarding, educational topics, meeting preparation or professional development. Or offer your topics to external users, including full external sign-up, to attract new leads and prospects into your brand and business.
Automated enrolments
Set up powerful self-enrolment rules to allow users to automatically join and find topics relevant to their roles, locations or requirements. Maintain separate topic libraries for staff, clients and prospects. Enable automated due dates, enrolment and reminder notifications.

Automated notifications
Use our ‘set and forget’ event subscription features to enable a range of notifications about user progress through each topic. You can include managers and other stakeholders on key notifications, including automatic reporting of user outcomes, contributions and completion.

Incredible reporting and data
Because Tribal Habits manages both content and users, it can provide a range of quantitative and qualitative topic data which is far beyond traditional learning management systems. This includes amazing written data from users, demonstrating knowledge transfer, on-the-job results and the value to your firm. Filter reporting online, or download all data via spreadsheets for unlimited offline filtering.

Built-in standard analytics
Tribal Habits has a range of built-in polling and analytics to improve your reporting. You can track existing experience, measure change and monitor the quality of your topics. All via simple checkboxes to enable or disable required analytics in each of your topics. We then automatically create the polling, navigation and tracking.

Easy user management
Create and update users via simple spreadsheet upload, including up to 20 fields of custom user demographics. Utilise SAML 2.0 single-sign-on including secure deep links directly into topics. Access our User API for complete two-way integration with your HRS.
COST EFFECTIVE PRICING TO SUIT ANY TEAM OR ORGANISATION

Start with our Monthly Actual plan and pay just $8 per active user each month including unlimited enrolments in all Marketplace topics. Or lock in discounts with Annual Expected plans for a minimum of 100 active users per month. All plans include all content features, unlimited stored users and unlimited stored topics.

<table>
<thead>
<tr>
<th>Active users / month</th>
<th>Actual</th>
<th>100+</th>
<th>200+</th>
<th>300+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly cost / active user</td>
<td>$8.00 (Minimum 5 users)</td>
<td>$5.00 ($6,000 / year)</td>
<td>$4.25 ($10,200 / year)</td>
<td>$3.75 ($13,500 / year)</td>
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<tr>
<td>Payment</td>
<td>Monthly</td>
<td>Annual</td>
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<td>Stored users</td>
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<td>Unlimited</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stored topics</td>
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</tr>
<tr>
<td>Content features</td>
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<td>All</td>
<td></td>
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</tr>
<tr>
<td>Marketplace enrolments</td>
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<td>Unlimited</td>
<td></td>
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<tr>
<td>External user access</td>
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<td></td>
<td></td>
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<tr>
<td>Single-sign-on access</td>
<td>-</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>API access</td>
<td>-</td>
<td>Yes (for 200+ users)</td>
<td></td>
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</tbody>
</table>

✔  Plan are ex GST, but there are no charges for implementation, support or licensing.
✔  An ‘active user’ is a user who logs in that month. We only count active users.
✔  Plans without Marketplace access are available (and are approximately 40% cheaper).
✔  Need more than 300 monthly active users? Contact us for a custom plan.
✔  Active users include any mixture of staff, clients and prospects each month.
LETS GET STARTED

LEARN MORE
You can learn more about Tribal Habits at tribalhabits.com. See more examples of Tribal Habits to get inspired about what your organisation can achieve, review our pricing plans, seek out answers to frequently asked questions and learn about the Tribal Habits process.

EXPLORE A FREE TOPIC
At tribalhabits.com you can enrol in our free monthly training topics, selected from our marketplace topics (which your firm can use to accelerate a library of topics). These topics allow you to experience Tribal Habits immediately. Plus, pick up some new skills!

START A FREE PLAN
The perfect way to begin with Tribal Habits is to get started with a free plan. Your free portal is completely free - no credit card required, no obligation to continue, no subscription to sign-up to. We'll set up your site and some example topics to get you started.

ORGANISE A FREE DEMO
We’d love to chat about your organisation and how you can get the most out of Tribal Habits. We can brainstorm topics, answer questions and map out the most effective implementation. Contact us at any of the following to organise a live demo for your team.

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