HOW TO

SHARE BEST PRACTICES

A step-by-step guide to turning best practice into common practice with online training

Tribal Habits

Welcome

Tribal Habits is the complete learning platform for modern organisations. With Tribal Habits you have online training that is easy to create, engaging to learn and simple to manage. At Tribal Habits, we break the learning journey for organisations into five stages.

Manage training online Learn more

Organisations waste a great deal of time with offline management of training. It is time-consuming and frustrating while issues with version control mean training information is often out of date.

Meet compliance needs Learn more

Compliance training is a vital part to your organisation's strategy, protecting staff and boosting the bottom line. Organisations must be proactive, not responsive, in managing these needs.

Convert existing training Learn more

If you're running workshops or have 'How to' manuals, you've done the hard work in creating content. Converting existing training to online modules dramatically leverages your content.

Optimise employee induction Learn more

How new employees are brought into an organisation matters. Optimising employee induction reduces churn, engages staff, reduces rework and makes new starters productive in less time.

Share best practices Learn more

Your top employees develop unique skills and approaches. Successful organisations capture and transfer this knowledge, increasing workforce capability and protecting against knowledge drain.

In this guidebook, lets focus on the 'Share best practices' stage. When I first came up with the idea for Tribal Habits, my priority was to help organisations unleash all the internal knowledge – best practices – I saw contained within them. So this guidebook is very close to my heart!

So many organisations have spent years and significant budgets building internal expertise. Honing the skills of their top performers, employing experienced staff to import new knowledge, refining internal processes to improve efficiency or creating customised tools to ensure standards.

> ALL TOO OFTEN, HOWEVER, ORGANISATIONS DON'T MAKE THE SMALL INVESTMENT TO SAFEGUARD ALL THOSE BEST PRACTICES FOR THE LONG-TERM. INSTEAD, INNOVATION OCCURS BUT IT IS NOT CAPTURED.

- It exists as tacit knowledge in the minds of different employees, many of whom leave for other adventures over the years.
- It exists in a myriad of documents, PDFs and slide decks, all saved in different locations and in different versions.
- It exists in a printed workbook, painfully created five years ago but now out of date – yet still being used in induction.
- It exists in one team, but not another team. In one location, but not another location. For one group of employees, but not all employees.

WHEN BEST PRACTICES REMAIN INTANGIBLE, THEIR VALUE IS SIGNIFICANTLY DECREASED. THEY ARE A CONCEPT – A HOPE OF SOMETHING WHICH COULD BE.

In this guidebook, I want to give you some ideas to help tackle this important problem. The investment made in capturing and sharing best practices is repaid many, many times over. The return on investment can be amazing. If you have one team operating at a best practice level, when you could have ten teams operating at that same level, it is easy to establish the business case to make the investment in best practice sharing.

Unlike issues of employee induction or compliance training, best practice sharing is a fluid solution. There are so many possible ideas to be captured that proposing a single way forward is not possible. This guidebook should give you inspiration to cut a path through to capturing and sharing best practices in your organisation. And, of course, Tribal Habits is the perfect tool to accompany your plans.

I hope you enjoy this guidebook.

David King
Founder | Tribal Habits

PS: You can reach me directly at david@tribalhabits.com with any questions or feedback.

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What knowledge do you want to capture from your experts?

Any organisation delving into training and development should first learn how to identify and assess training needs. It is counter-productive to offer training to staff who do not need it or to just offer the wrong kind of training. A Training Needs Analysis (TNA) puts your, often limited, training resources to the best possible use.

INDEED, AN EXCELLENT TRAINING PROGRAM SHOULD NEVER COST YOUR ORGANISATION ANYTHING.

It should provide a positive return on your investment in the form of increased productivity, improved employee retention, or lower overall costs.

Traditional TNA often assesses training requirements in a three-level hierarchical order – organisational needs, task or job function needs, and individual needs. That approach is fine if you have dedicated training staff who can organise all the various results.

For organisations, let's consider a more practical approach, which focuses training resources on precise objectives.

Step 1: Determine desired business outcomes

Before a TNA can begin, your firm needs to articulate the goal of the training. More directly - what are the expected business outcomes of the training?

Training should correspond to business objectives. It's that simple. Objectives can be specific to a person, department or the entire firm. When business objectives lead training needs, you will prevent a huge range of training problems from arising later.

The ultimate goal of training can then be clearly communicated. This ensures that the entire TNA process keeps the desired outcomes in sight. It is best for a firm to answer the question: "How will we know that the training has worked?". Starting from this end goal will help you work backwards to the correct training solution.

Examples of ultimate goals are:

- Improve client service satisfaction ratings
- Increase the success rates on sales proposals
- Improve employee morale through management supervision
- Reduce the time required to prepare client advice

Step 2: Determine the competencies which drive desired business outcomes

From these identified business outcomes, there will be associated staff behaviours. These behaviours are a result of staff…

1. Knowing what to do
2. Having the capability to do it, and
3. Having the motivation to do it

At this step in the process, the firm should identify the desired critical competencies – behaviours, knowledge, skills, abilities, personal characteristics - linked to desired business outcomes. This is usually achieved by collecting information from subject matter experts within the business.

Identifying these competencies may take the form of interviews, focus groups or surveys. Regardless of the method used, the data collected should result in a clear understanding of how critical each competency is to achieving the desired business goal.

> THINK OF IT AS A FORMULA. IF THE DESIRED RESULT IS X, WHAT COMBINATION OF A, B AND C TYPICALLY RESULT IN THE OUTCOME OF X – WITH A, B AND C BEING SKILLS, KNOWLEDGE, PERSONAL CHARACTERISTICS AND SO ON.

A rating scale is often used to assess the importance of specific competencies. For example, you could ask 'How important is [competency] successful performance in [desired outcome]?' and use a ranking from 1 (not at all) to 5 (extremely).

We recommend that you focus on ratings with an average of at least four to ensure only competencies that are deemed *critical* are considered for inclusion in other TNA steps.

Step 3: Identify which competencies are trainable

Once you have identified a series of competencies which can drive desired business outcomes, we now need to consider if the solution is training. Not every competency can be improved through training.

For example, a business development role may require staff to be outgoing and initiate conversations with total strangers. It may be more effective, then, to only hire people who are already extroverts, rather than to attempt to train introverts to be more outgoing. Similarly, it may be more useful to hire people with specialised knowledge, than to educate them on complex issues.

You should evaluate each critical competency from Step 2 and determine if each one is something you expect staff to possess before entering that role.

In addition to recruitment, there are two other issues which should be identified and, if needed, addressed before selecting training as a solution.

- Resources. Is the reason your staff are not achieving the desired business outcome simply due to inadequate resources? This might means that your staff are just under-resourced and are already too busy. They lack priorities and are just struggling to keep up. Perhaps the staff cannot access required resources, including IT, travel or tools, to do the job required of them. In both cases, training will not solve their problem.

- Remuneration. Is the reason your staff are not achieving the desired business outcome simply due to misaligned remuneration? If your staff are paid to achieve other outcomes, then they will focus on those other outcomes. This includes any key performance indicators. If your relationship management staff are asked to increase new business, but their KPIs do not include any new business metrics, then it is unlikely they will change their behaviours. If there is any misalignment of remuneration, then training will also not solve their problem.

In total, the issues of recruitment, resourcing and remuneration should be identified alongside your competency table. What remains should provide you with a list of critical competencies that are amenable to training.

Step 4: Evaluate existing staff competencies

With a targeted list of competencies, you can now determine the extent to which your employees possess these desired competencies. The most often used methods for this are:

- Competency evaluations, and
- Tests or assessments.

Competency evaluation surveys are best used to evaluate observable behaviours. This can be readily accomplished by taking the critical competencies from Steps 2 and 3 and having knowledgeable people rate the targeted staff's behaviours. This usually means managers.

When assessing managers or executives themselves, you can use multiple observers, including peers, subordinates and clients, to evaluate competency (often via a 360-degree survey).

Competency evaluation surveys become less effective the more you have to infer unobservable competencies such as ability, skills and personality. Evaluation of these competencies is better done through the use of tests and assessments.

There are many tests available to measure specific skills, abilities and personality characteristics. However, choosing the right test should be done in coordination with a testing professional with skill in this area. Care should be taken in selecting tests that are valid measures of the targeted competency. Without care, it is easy to spend considerable money on these assessments for results which are either vague, not relevant or don't match your requirements.

An alternative is a custom-designed assessment, especially if you want to measure specialised knowledge or effectiveness in a significant area of work. These can range from multiple choice job knowledge tests, through to elaborate job simulations. For example, an instrumental approach to measuring the training needs of managers is using an *assessment centre,* comprised of different role-play exercises that parallel managerial situations.

Once again, this can be a big spend and effort to organise, but if your desired business outcome is to improve management, then this assessment process might be a justified; or even required spend.

Step 5: Determine performance gaps

Next, individual results should then be combined to assess how many staff are in need of improvement in particular competencies.

To do this, you first need to determine what constitutes a 'performance gap'. That will vary from firm to firm. Some firms set higher standards than others.

Setting that standard will provide you with an understanding of how many staff fall above or below that standard. Traditionally, those falling below would be considered to be in need of training. However, high performing staff should also be targetted for training in advance or extension areas. High performing staff identified in this step can also be used as subject matter experts for training content or delivery later on.

Step 6: Prioritise your training needs

Finally, you should aggregate the results from Step 5 with information on the performance gap pervasiveness. That is, you should total how many, or what percentage, of the targeted workforce needs the training. You should also consider the importance of the competency (see Step 2).

Together, pervasiveness and importance should result in a list of training priorities. From there, you can start to think about how to source content for that training and the various training delivery methods.

What are common areas of expertise to capture knowledge on?

Whether you are managing a growing range of training topics or looking for inspiration on how to map out your training pathways, it's useful to have a hierarchy or grouping of training *streams* within your organisation. So let's review the most common training streams for organisations to help you define suitable streams for your firm.

Business Development

This stream focuses on 'new business' and 'new clients'. This is often a stream which many professionals find challenging. Business Development differs from Sales. Business development is about finding new clients and bringing them into the sales process. The Sales stream then focuses on the conversion of new clients into billable revenue (among other things).

> THIS STREAM IS SIGNIFICANT FOR GROWTH IN A ORGANISATION – OVERALL REVENUE, GROWTH IN NEW CLIENTS, BUSINESS FOR NEW ADVISERS OR CONSULTANTS, EXPANSION INTO NEW SERVICES, DEVELOPMENT INTO NEW PRODUCTS.

It should include both personal skills in business development, but also organisation-level knowledge about marketing, branding and planning. Elements of this stream should apply to all client-facing professionals, while other topics in this stream may only be suitable for your business development teams or managers.

Example topics in this stream include…

- Client referrals
- Internal referrals and cross-referrals
- External referrals and referral partners
- Referral marketing
- Personal branding
- Thought leadership
- Business networking
- LinkedIn profiles and strategies
- Cold calling and telephone skills
- Business Development planning
- Presentation skills
- Writing articles and blogs
- Managing social media
- Understanding the client journey and buying cycle
- Ideal clients and client personas
- Business branding

Sales

The sales stream focuses on capturing opportunities – creating revenue. This includes converting new leads into new clients, but also repeat business, up-selling and cross-selling.

This stream is often a struggle for many professionals who have a negative view of the concept of 'sales'. They may view 'selling' as unprofessional. As a result, this stream must often begin with training which establishes a suitable sales framework or methodology which is appealing to those professionals and your business culture. Until your staff recognise that selling can be a positive experience for both the client and themselves, it is unlikely any other topics within this stream will be effective.

Topics in this stream include…

- Introduction to selling or sales methodologies
- Building trust in the sales process
- Listening skills
- Questioning skills
- Developing a value proposition
- Closing techniques
- Managing proposals
- Writing proposals
- Presenting proposals
- Presentation development
- Business writing skills
- Managing client objections
- Negotiation skills

Relationship Management

This stream focuses on the servicing and on-going relationship with clients. For professionals with transactional clients, this is more about excellence in execution of a transaction. For professionals with relationship clients, this must also include on-going relationship management techniques. For many professionals, this stream is about 'work in progress' or project execution. So it must cover issues of both quantity and efficiency, as well as quality and excellence.

Topics in this stream include…

- Managing client expectations
- Conducting client review meetings
- Repeat purchases
- Cross-selling
- Up-selling
- Service excellence
- Handling client complaints
- Managing client portfolios
- Referrals, references and testimonials
- Seeking client feedback
- Project management

Management and Leadership

This stream focuses on two issues which could easily be split into two streams: the management of people and the leadership of an organisation. In smaller firms, these roles are shared. However, in larger firms, there may be managers whose purpose is people focused, while more senior leaders focus on business strategy.

> THE BIGGEST CHALLENGE FOR MANY ORGANISATIONS IS THAT STAFF ARE OFTEN PROMOTED TO MANAGEMENT POSITIONS BASED ON THEIR TECHNICAL OR COMMERCIAL SUCCESS – NOT THEIR TEAM AND PEOPLE SKILLS. GREAT MANAGERS DON'T ALWAYS COME FROM YOUR STRONGEST PERFORMERS.

In fact, strong performers can sometimes have a selfish streak, required to drive their results and ensure they are competitive in sales and business development. That streak can be problematic when their role suddenly involves people management.

Topics in this stream include…

- Coaching and developing staff
- Staff delegation
- Mentoring others
- Discussing staff performance
- Managing staff training
- Motivating staff and teams
- Recognising and rewarding staff performance
- Leadership skills
- Setting expectations with staff
- Interviewing and recruitment tips
- Managing conflict
- Business ethics
- Building teams
- Change management
- Business strategy

Personal Development

This stream is often viewed as containing all the 'other' topics relevant for a professional. However, a better way to think of this stream is that it contains the skills required for any professional to be effective in any role. While the streams on business development, sales, relationship management, and management and leadership are role specific, this stream is role agnostic. From support staff to senior leaders, this stream covers the essentials to operate efficiently and effectively.

This stream is also important for professionals whose technical and role expertise is strong, but they are struggling to operate at a high level in your business. These staff lack organisational or productivity skills, or may be struggling to communicate effectively with others.

Topics in this stream include…

- Managing time and productivity
- Managing priorities
- Goal setting
- Managing email
- Managing meetings
- Communicating effectively
- Decision-making skills
- Influencing skills
- Managing stress
- Emotional intelligence

Compliance and Technical

Your business needs will drive the final stream in learning – compliance requirements and technical capabilities. As with management and leadership, you could break this into two streams.

Compliance requirements vary widely between industries, driven by specific regulatory requirements. However, compliance streams should also address universal issues of appropriate workplace behaviours including harassment, discrimination and workplace health and safety.

Technical requirements also vary with each industry. There will likely be some accredited technical training available from registered training providers. However, technical training can also originate from within the firm, as internal experts share best practices in the technical aspects of each role and industry. This is often the 'street smarts' to match the 'book smarts'. As a result, it is often this stream of 'technical best practice' which is of greatest interest to professionals as they feel familiar with the topic and keen to improve upon it.

Topics in this stream will depend on your industry, but can include…

- Workplace health and safety
- First aid training
- Injury management
- OHS awareness
- Privacy awareness
- IT security
- Appropriate IT usage
- Risk management
- Discrimination awareness
- Harassment prevention
- Workplace bullying
- Cultural awareness

What options do you have for training content?

Broadly speaking, you have two primary sources of content for your training.

1. **External knowledge.** This is knowledge 'imported' into your firm from an external source. This might be an external training provider, learning purchased online or a consultant who provides new knowledge or processes.
2. **Internal knowledge**. This is knowledge which already exists within your firm. This is often knowledge from internal subject matter experts or other experienced staff. The knowledge may be universal (like sales skills), or it may be unique (such as internal documents).

There are pros and cons to both types of knowledge, and there are scenarios where either could satisfy your training and learning objectives. Let's examine both in more detail.

External knowledge provides ready-made solutions to fill gaps

Knowledge from an external source can be a powerful addition to your firm when used in the right circumstances.

> HOWEVER, WHEN USED INCORRECTLY, EXTERNAL KNOWLEDGE CAN BE BOTH INEFFICIENT AND INEFFECTIVE. IN THIS RESPECT, EXTERNAL KNOWLEDGE IS RISKIER THAN INTERNAL KNOWLEDGE.

There are two major risks with external knowledge.

- **Cost**. External knowledge can be expensive. You are purchasing someone else's intellectual property, which may have taken years to develop.

- **Suitability**. External knowledge may not be suitable for your firm and its needs. External knowledge is usually designed to appeal to a wide audience (simply to make it practical to manage and deliver). This is great when that knowledge has a strong match with your firm's processes, culture and objectives. However, external knowledge often requires a high degree of tailoring by participants to 'make it fit'. This is why many external training programs fail – the content requires too much adjustment to be effective for participants.

External knowledge which is more industry-focused rather than firm focused, such as technical training often has a higher success rate. The more firm-specific the external knowledge is, such as client processes, sales skills or management ideas, the higher the risk of a poor fit and poor take-up. With a higher cost than internal knowledge, this makes the choice of external knowledge a riskier option.

That being said, there are scenarios in which external knowledge is a perfect choice. These include:

- **No internal knowledge.** When your firm lacks internal expertise in a topic, there is no choice but to use external knowledge. Technical and compliance training may apply here, but there are some softer skills in which your firm may have no internal subject matter experts.
- **An effective transfer process**. Sometimes the value of external knowledge isn't the knowledge itself, but the process and methods in which it is delivered. The knowledge may not be a perfect fit, but the facilitators, delivery method, materials and coaching associated with the knowledge can deliver a great result. This does require highly developed delivery methodology from the external knowledge provider.

- **Needing an external voice to break through barriers**. Sometimes, you just need an external view to help staff overcome blind spots, reluctance or assumptions. When attempts to provide internal knowledge to staff are not working an external voice, even if it is providing essentially the same knowledge, might provide a fresh approach. A good combination is often found by using an external speaker at a staff conference to 'shake things up' and get everyone on board, followed by internal knowledge to then implement the ideas.

Of course, the worst possible outcome for external knowledge is when you pay for an expensive external solution, only to find it suggests knowledge which already exists within your firm, and it is presented in a generic fashion so it fails to resonate with staff. This, unfortunately, is an all too common experience when the external knowledge option is chosen.

Internal knowledge provides low cost and perfectly adapted solutions

Internal knowledge is not without its flaws, but it is an option which lowers the risk considerably. This is because of two key strengths found in internal knowledge.

- **Suitability**. Internal knowledge is the perfect solution *for your firm*. Since internal knowledge is developed within your firm, it provides an exact answer to your needs. Internal knowledge is aware of your processes and culture, it has been tested with your staff and clients, it can utilise existing documents and tools, and it is presented in a language which resonates with your staff.

- **Cost**. Internal knowledge already exists within your firm. You have already paid for it through staff salaries. The only real cost is extracting the knowledge from staff and putting it into a transferable format that other staff can learn from. The investment is time.

With high suitability and low cost, the risks of using internal knowledge are low. If training based on internal knowledge does not work, there is little that has been lost. With such high suitability, internal knowledge typically has a greater take-up and success rate. All that is required is the ability to identify your subject matter experts and empower them with the right tools to capture and share their expertise effectively.

Internal knowledge has a wide range of scenarios where it can excel as a source of training content.

- **Unique processes, tools, documents or software.** If your firm has unique internal processes, based on tools, documents or software developed internally, then internal knowledge will be your only source of content.

- **Induction training.** Internal knowledge is the very foundation of induction training. It can be used to provide new staff with access to the way your firm operates by communicating internal processes, company values, organisational culture and your firm's value proposition.
- **Client servicing and skills.** Every organisation has its differentiated methods for engaging with clients. This can include how to position the firm with new clients and manage sales processes, to how clients are on-boarded or projects are managed, through to the defined service levels promised to clients. Such training cannot be effectively supplied externally (beyond generic concepts).

- **Efficiency and administration.** Within your firm, your staff will have identified the most efficient means to complete various tasks and use internal tools. This can be particularly important for service, admin or back-office staff who often do not receive much training. Yet within those teams, there is internal knowledge which could significantly reduce expenses or boost productivity.

- **Best practices.** Every firm has its best practices; the tried and tested skills or processes which make that firm great. Best practices cannot be sourced externally. They are unique to each organisation and can only be found through internal knowledge.

Mixing external and internal knowledge

For many years, external knowledge dominated professional services training. Experts were brought in from outside to provide training and as a result, training was 'something that happened to staff'. It was an event, something that staff simply attended.

Over the last 5-10 years, new tools and technologies have allowed internal knowledge to gain popularity. It is often lower cost and more effective and has become even easier as software and platforms provide simple knowledge sharing solutions. Internal knowledge allows training to be an on-going process allowing staff to become involved with, or even originate, the training, rather than sit as a third party while the training happens around them. It allows improvement to be continuous.

External knowledge remains important for some technical, regulatory and compliance issues. It can also fill skill or knowledge gaps or provide a fresh voice to a topic which the firm is struggling with. However, it is no longer the starting point.

Instead, internal knowledge should be the starting point. Firms should ask, 'Why can't we source our training content internally?'. If there is a good reason, then external training becomes the fall back to supplement internal knowledge.

> IF YOU START BY LOOKING WITHIN YOUR FIRM, YOU MIGHT BE SURPRISED AT JUST HOW MUCH KNOWLEDGE AND EXPERTISE IS AVAILABLE FOR YOUR TRAINING CONTENT.

How can you create training based on internal best practice knowledge?

If your goal is to source training content from internal knowledge, there are a variety of ways to achieve this. Like many solutions, there are simple choices and there are robust choices.

> DETERMINING WHETHER YOU NEED A QUICK FIX OR A DEDICATED SOLUTION COMES DOWN TO YOUR TRAINING CONTENT AND OBJECTIVES.

Let's consider a range of options for capturing and sharing internal knowledge.

Documents

Internal knowledge sharing starts with documentation. Subject matter experts can create documents capturing their knowledge with almost no cost or training at all. Most professionals are capable of using Microsoft Word to create documents with headings and images. Those documents can be saved and distributed via reliable PDF format. It's quick and easy to update.

However, documentation-based internal knowledge has some severe limits.

- **Passive**. There is no interaction by the reader, so the transfer of knowledge requires a highly motivated participant who is comfortable learning by reading.
- **Unmonitored**. It's very hard to tell who has read a document. Tracking of knowledge sharing and completed training is almost impossible.
- **Static**. The reader cannot contribute, cannot interact and cannot watch live movement. Images may be available, but that's about it.
- **Hidden**. Documents need to be accessible. Without a platform to share, categorise and search document content, sharing can be difficult.
- **Secure**. Documentation is not secure. It is hard to track versions and documents are easy to share externally.

That being said, for some forms of simple internal knowledge, short processes and some technical reference knowledge, this may be an effective method.

Slides

Slides (such as PowerPoint or Keynote) are a variation on a document. Slides can give more structure and, if well-written and well-represented, can be slightly easier for staff to digest. Slides can also be easily presented so they can be combined with some of the other sharing methods outlined here.

Slides still have all the limits of documentation though.

- They are passive and unmonitored
- They are largely static and not easy to find
- And they are just as unsecure

Worse, slides are not well designed, making them less appealing than documents in this regard. A set of slides containing short bullet points may be meaningless to the uninformed, whereas a document with complete explanations would provide more context.

Videos

Video recordings of your subject matter experts are a great way to capture and share knowledge. Videos are engaging to watch, provide more context than text alone, and can demonstrate techniques and skills more intuitively.

There are many ways to capture video of your internal experts.

- **Screen recordings.** This involves your internal experts recording their computer screen as they complete a task. Typically, they would also narrate their actions over the video. There are many free or low-cost screen recording options.
- **Webcam.** Many computers and laptops have built-in webcams which can record simple 'talking head' videos of your experts as they explain key concepts. With a simple background, decent lighting and good audio, this can be a quick way to capture knowledge on video.
- **Mobile phones.** The video recording capabilities of modern mobile phones are amazing. With a good phone, it is easy to shoot interviews or demonstrations with your experts. The key to successful mobile phone recording is to ensure audio quality. If the phone is too far away, the audio quality can be very poor. Dedicated lapel microphones may be required.
- **Professional.** A professional video shoot can provide high-quality video and audio, usually with engaging editing and titles. It can also eliminate problems of poor lighting, background distractions, shaky videos and so on. The only issue is cost.

Video by itself is not a solution though. Video needs to be available to everyone in your firm. There are further limitations and challenges of video.

- **Design**. Good video works well, but it's easy to create a terrible video. Poor audio, bad lighting, boring presenters, poor editing and more.
- **Size**. Video files are huge. For smooth video playback, you need a dedicated video hosting environment capable of streaming video at high quality to multiple viewers and on any device. Merely saving video files on a shared drive doesn't accomplish this.
- **Search**. Videos need text documentation to allow for searches. A folder full of videos isn't easy to search. Dedicated video hosting environments require text summaries of the videos to enable staff to find the right videos.
- **Editing**. Videos are fixed assets. Once recorded, they are almost impossible to change later. If something in the video becomes out of date, it is hard to remove and often impossible to replace that single piece of outdated content. This is perhaps a key reason why technical information presented via video must be done carefully to limit future risks.
- **Time**. Videos can be created quickly by experienced staff but can also become significant time wasting experiences. Poor videos might need to be re-recorded. Staff inexperienced with video presentation may require many takes. Editing videos can take a long time.
- **Accessibility**. Videos do not work well for the hearing or sight impaired without some careful planning. Captions can be costly (time and money) to create for the hearing impaired. Videos for the sight impaired need to be carefully constructed.

Ultimately videos are compelling but require some careful construction and an appropriate video hosting environment.

Presentations

Presentations occur when your internal experts give a live presentation to other staff to share knowledge and provide training, often using slides. It might be during a team meeting, at a staff conference, at a regular 'lunch and learn', or on a webinar. In all cases, it's your internal expert presenting their knowledge.

> PRESENTATIONS CAN BE A GREAT WAY TO CAPTURE AND SHARE INTERNAL KNOWLEDGE. WHILE KNOWLEDGE CAN BE SHARED IN MANY WAYS SUCH AS SLIDES OR VIDEOS, THE VALUE OF PRESENTATIONS LIES IN THE LEVEL OF INTERACTION THEY ENCOURAGE.

Other staff should be able to ask live questions to the internal expert to boost understanding and explain uncertainties. An excellent presenter will also engage the audience with questions and discussion, increasing engagement and participant rates.

The tricky part with presentations is the presenter. Internal experts are not always great speakers. Too often these sessions become ineffective due to the internal expert's inability to present their knowledge in a way which is easy for non-experts to understand. They may not effectively organise or structure their thoughts, or they may be a disengaging presenter.

Presentations are also a 'moment in time'. Unless the session is recorded, the effort to create and run the presentation is not re-usable. As discussed above, slides are often hard to understand on their own and asking your internal experts to repeatedly present their slides is inefficient.

Recorded presentations or webinars are an option, but it is rare for a professional to actively engage with a long recording. Even professional TV shows struggle to engage audiences for more than 30-45 minutes, and that's with TV-level budgets and staffing! Live presentations are amazing, but recorded presentations are often less effective.

Presentations can involve much work for a small (or one-off) reward.

Social media platform

Internal social media platforms allow staff to share and exchange knowledge in a 'close to real-time' or 'just in time' fashion. Even small firms using instant messaging platforms can enable staff to quickly seek out expertise from within the firm when needed.

The beauty of social learning is that it connects the learner directly with the expert. The learner is also seeking information when they need it – when they are actively engaged in finding new skills or a new solution. They can often immediately apply this knowledge too. It creates highly motivated learners.

It can, however, create a burden for your internal experts. Their time can be wasted if they are being asked for the same information repeatedly from multiple staff, or they face constant interruptions for small pieces of knowledge.

Knowledge sharing via social learning is also 'shallow'. It is typically short and addresses very specific questions rather than addressing a 'deep' analysis of the topic. Not all knowledge can be acquired at the moment it is needed either. Sales skills, for example, need to be learnt in advance – you can't stop a client meeting to quickly Tweet questions to your internal experts!

Social learning isn't the perfect solution, but in many cases, it can be a great supplement to other formats of internal knowledge.

eLearning modules

eLearning (online learning) is an exceptionally suitable way to capture and share internal knowledge. As we have discussed earlier, eLearning is an excellent delivery method for professionals. It is repeatable, available 24/7 in any location, and easy to monitor.

Transferring internal knowledge into an eLearning format also improves the way that knowledge is captured. It provides a better structure to organise the thoughts of your experts than documents or slides can. It easily encompasses materials in slide and video format, but enhances them with more interactive elements.

Quizzes, social learning, polls, reflection activities and assessments are easy to add to eLearning to boost the transfer of knowledge and measure its impact. But it's important to note that this will only be an easy option if you are familiar with eLearning authoring tools.

> THEREIN LIES THE MAIN CHALLENGE WITH ELEARNING – IT'S ONLY EASY FOR THOSE WHO ARE EXPERTS IN ELEARNING. ELEARNING AUTHORING TOOLS (LIKE ARTICULATE STORYLINE OR ADOBE CAPTIVATE) ARE POWERFUL PIECES OF SOFTWARE WITH STEEP LEARNING CURVES.

In the hands of an expert designer, they can result in terrific training. The challenge is that your internal experts are probably not also experts in eLearning design.

To make the most of eLearning as an internal knowledge tool, you are going to need the services of an expert. You really only have two options here.

A. **Engage an external expert.** There are many eLearning freelancers and design firms you can hire to develop eLearning for you. They can work with your internal experts to capture their knowledge and utilise any existing materials. Your internal experts typically need to devote a few hours to organise their thoughts, then a few hours of interviews and then a few hours reviewing draft modules for accuracy.

B. **Hire a dedicated training manager.** Alternatively, you could hire a dedicated training manager to develop your learning content. Be certain, however, that your training manager is proficient in eLearning instructional design techniques. Like any role, not all training managers are skilled at every aspect of their industry – some are specialists in facilitation, others in training management, while some are expert instructional designers.

As you can probably tell, developing eLearning is expensive. External experts may spend 20-40 hours developing a 1-hour eLearning module. There will then be additional costs for templates, video production and graphic design. It is not unusual for firms to spend between $5,000 and $10,000 per eLearning module.

Also, you will need a learning management system to host and distribute your eLearning modules. eLearning modules cannot be accessed on their own like a PDF document. They require a hosting platform to manage users and track completion.

A final, but important hurdle for eLearning modules are changes and updates. eLearning modules can ONLY be edited in the original software which developed them. Simple things like spelling errors require the original software (and expert who created the module) to make the edit, export the module and upload it back to your learning management system.

Yet the results are impressive. eLearning offers superior training using content that is engaging, relevant and measurable. For firms with the budget, eLearning is a terrific way to capture internal knowledge.

Knowledge sharing platform

A final option for capturing internal knowledge is a knowledge sharing platform. These platforms are designed specifically for this purpose.

They attempt to take the best parts of other options and eliminate the negatives.

Knowledge sharing platforms (not to be confused with learning management systems or learning experience platforms, which are focused on administering professionally created eLearning) are designed for anyone to use. Any expert in your business should be able to log in to the platform and use the available tools to create eLearning modules about their expertise.

The platform provides your experts with a very low learning curve with intuitive tools similar to those in PowerPoint or Word. The platform provides your expert with guidance, tips and feedback to help them structure their thoughts and capture their ideas. The entire process should really take no longer than it would to develop the same content in slides or documents.

The advantages, however, are many.

- **Interaction**. Knowledge sharing platforms allow your experts to easily add interactive elements like 'question and answer' moments, surveys and polls showing aggregated data from your firm and quizzes to test understanding.

- **Delivery**. Knowledge sharing platforms allow your expert to focus on what they know best – their area of expertise. The platform then automatically transforms that content into an interactive online experience for your staff available 24/7 in any location. The platform provides all the navigation, formatting, notifications and enrolments. It's like a 'training manager in a box'.

- **Social**. Knowledge sharing platforms allow your staff to share ideas within each topic, contribute new expertise and compare opinions. It gives you many of the same benefits of social media platforms, but with a deeper, richer experience.

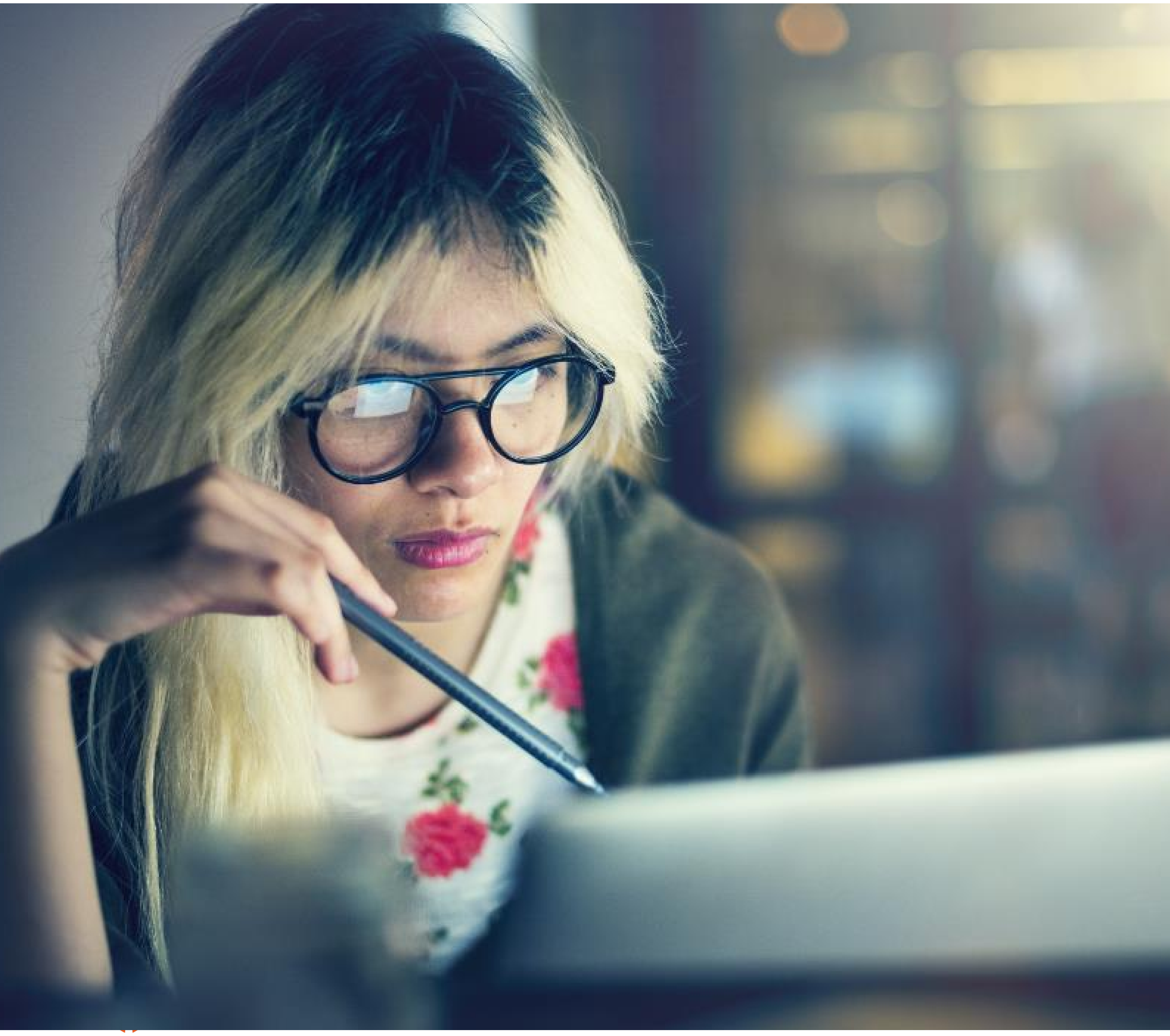
- **Reporting**. Unlike learning management systems which only control users (and then rely on imported content), knowledge sharing platforms control both users and content. As a result, they can provide a wealth of data, far beyond that of any other form of training. This allows your firm to measure success and demonstrate RoI very easily.

- **Updating**. Knowledge sharing platforms also allow easy and instant updates to your content. Spelling errors can be corrected in seconds, and new knowledge (changes in processes, new documents) can be added into existing topics without any other software requirements.

There remains a time commitment from your experts to capture their thoughts; unfortunately, mind-reading platforms do not yet exist! However, there is a time commitment required for any internal knowledge sharing option. The key is to minimise the time and maximise the output. That's where a dedicated knowledge sharing platform excels.

IF YOU COMBINE A KNOWLEDGE SHARING PLATFORM TO COVER THE MAJORITY OF YOUR INTERNAL KNOWLEDGE (INCLUDING HOSTING VIDEOS), THEN YOU CAN EFFICIENTLY UTILISE DOCUMENTS TO MANAGE THE REMAINING SIMPLE FORMS OF TRAINING AND KNOWLEDGE.

The combination is a powerful, low-cost, high-impact solution.



How do you build a culture of knowledge sharing?

Whether you utilise internal knowledge as your primary source of training or not, chances are that your business utilises internal knowledge sharing in some way. It's worth taking some time to consider whether this occurs through informal channels or is formalised into the very culture of the firm.

Knowledge sharing is far more than just showing your colleague how to use shortcuts in the invoicing software. For a organisation, a knowledge sharing culture is the very essence of strategic advantage!

> IF HUMAN CAPITAL IS THE PRIMARY RESOURCE FOR A ORGANISATION, THEN KNOWLEDGE SHARING – ALONG WITH ITS IDENTIFICATION AND CAPTURE – IS THE KEY TO LEVERAGING THAT RESOURCE.

The problem is that most organisations **don't understand what knowledge is.** They confuse knowledge with information. In particular, they focus heavily on technical information, often at the expense of commercial expertise. They also tend to create an environment that rewards the hoarding of knowledge, not the sharing of knowledge.

What is knowledge and how does it differ from information?

Many organisations attempt to capture knowledge in the form of PDF documents or an internal information repository. By doing this, they believe that knowledge is being shared effectively. However, this isn't knowledge sharing at all.

Let's consider the definition of knowledge from the Oxford English Dictionary:

- Knowledge: *facts, information, and skills acquired through experience or education; the theoretical or practical understanding of a subject.*

As you can see, information by itself is not knowledge. Information is merely 'provided facts'. Knowledge is the *application* of that information.

Knowledge is the context, the experience, the know-how. Every organisation broadly has access to the same information. What differs is their knowledge – how they use that information.

Knowledge is the skill, information is merely data

Knowledge sharing must go far beyond listing data and facts. It **must capture what to do with that information and how to use it,** both efficiently and effectively. This means knowledge sharing cannot occur unless it is tapping into experience and expertise. As such, knowledge sharing must come from within your staff, not a spreadsheet.

Many organisations struggle with this, as they focus on the importance of technical information. They deal with facts, statistics, rules, regulations, and a heavy emphasis on compliance and safety. This daily bias towards technical information means that the broader issues of knowledge – including management, commercialisation, business development, personal skills, productivity, administration and leadership – are often overlooked.

So, the first step for knowledge sharing is to recognise that knowledge is far broader than technical information. It must encompass the entire know-how of its staff and that's where the strategic advantage lies. However, given that this know-how lies within the minds of its staff, we encounter the second problem of actual knowledge sharing.

Why don't professionals naturally share their knowledge?

Most organisations tend to promote and reward staff based on the outperformance of their peers. Partners who close more deals tend to receive bigger bonuses and move to more senior positions. This appears to send a message that professionals who keep knowledge to themselves can have an internal advantage over their peers. One they can use to obtain a bigger slice of the bonus pool, or to get ahead in the race for promotions.

Many organisations end up creating a culture which favours the expert and encourages the hoarding of knowledge.

This is precisely the opposite culture required for knowledge sharing. Not surprisingly, when expert staff are asked to share their knowledge with their colleagues, they are often reluctant to do so. What's in it for them? Will they lose their relative advantage even though their colleagues benefit and the business is better off?

KPIs often prevent a knowledge sharing culture

By examining the KPIs often found in organisation, we expose the issue. There are usually KPIs for revenue, perhaps KPIs for expense management, and then typically some KPIs around professional development (which is largely focused on learning new technical information).

There will also be a few KPIs around knowledge sharing. A two-hour passive webinar on a new tax rule will help an accountant meet their 'training' KPI, but a two-hour highly interactive coaching session on client interviewing techniques may not count towards that KPI.

Worse, KPIs tend to emphasise the consumption of knowledge. Accountants might have to undertake 20 hours of training each year. However, where does the training originate? It's unlikely to be from their colleagues in the form of knowledge sharing, as there is unlikely to be a KPI for the capture and sharing of internal expertise.

Without any KPI to encourage professionals to capture and share their expertise, a firm's training options often consist only of technical information training, or generic external training content.

To be clear, external training content is not knowledge sharing it is knowledge 'importing'. Any external knowledge needs to be adapted to fit the particular context of your business. External knowledge will never fit as well as the knowledge generated from within your business.

> THIS IS COMPLETELY DIFFERENT TO KNOWLEDGE SHARING, WHICH CAPTURES EXISTING, PROVEN EXPERTISE WITHIN YOUR BUSINESS AND FOCUSES ON ITS STANDARDISATION THROUGHOUT THE BUSINESS.

What is a knowledge sharing environment?

Changing the game around knowledge sharing requires a firm to **rethink the very nature of knowledge:**

1. Information is not knowledge. Knowledge is the know-how around that information.
2. Knowledge sharing requires the direct involvement of those with the know-how.
3. The creation of knowledge and training must be as important as its consumption.
4. The recognition for collaboration must be as important as that of individual performance.

Any organisation which views its expertise and knowledge as a valuable resource – a resource which could be a strategic advantage – needs an environment that encourages knowledge sharing. It requires a culture of **collaboration**, not a culture to worship the 'cult of the expert'.

Firms are advised to work backwards through the above four points, starting with individual recognition for sharing. People are motivated by 'what's in it for me'. If the only benefit for knowledge sharing is for others, then individual staff are unlikely to participate unless they are intrinsically motivated.

Recommendations to create a culture of collaboration can include:

- KPIs for the creation of content, knowledge and training
- Promotion hurdles that include a demonstration of knowledge sharing
- Internal time recognition for time spent capturing and sharing knowledge such as an internal 'knowledge client' which can be charged at external client rates
- Hiring policies that emphasise collaboration, teamwork and sharing
- Reward and recognition by peers and management of sharing and collaboration
- Investment in a knowledge sharing solution to institutionalise collaboration
- An environment that supports transparent communication and open-door policies

Unlocking the habits in your tribe

The journey towards collaboration and knowledge sharing requires changes in culture, KPIs and behaviour. It also requires the right tools. Utilising 'death by PowerPoint', passive PDFs, or instantly forgotten 'lunch and learn' sessions won't solve the problem.

> KNOWLEDGE SHARING REQUIRES A SOLUTION THAT'S REUSABLE BY NEW STAFF, READILY UPDATED AS EXPERTISE DEVELOPS, ACCESSIBLE FROM ANY LOCATION, ALLOWS NEW KNOWLEDGE TO BE READILY CAPTURED FROM ACROSS THE FIRM, AND CAPTURES KNOWLEDGE ON A WIDE RANGE OF TOPICS IN A CONSISTENT WAY.

That's where Tribal Habits steps in.

Tribal Habits provides your organisation with a branded, secure, cloud platform to drive cultural change and create a knowledge sharing environment.

Your internal experts can tap directly into the platform to quickly capture their knowledge – on any topic – in a structured and guided process. Your staff can then acquire this knowledge in an interactive format.

With Tribal Habits, staff can:

- Be tasked with on-the-job activities to drive behavioural change
- Contribute new knowledge to refine the topic over time
- Demonstrate understanding through assessments
- Provide a wealth of quantitative and qualitative feedback for the business

Just imagine if everyone in your firm knew the best practices, proven processes and dedicated expertise of your top performers. How much of a difference could that make to every aspect of your firm's performance?

How do you select the right expert staff to share their best practices and knowledge?

The successful sharing of knowledge within your organisation is dependent on how you select subject matter experts. The staff you choose for this task will ultimately have a significant impact on not only what knowledge is shared, but how it is shared. As a result, it's critical to make a wise choice!

Sometimes, in small teams or organisations, the choice of an expert is obvious (or even limited to a single person). In larger organisations, finding an expert can be harder – they are often unknown to human resources management or learning and development teams.

So the choice of an expert needs thought and management. In particular, successful knowledge sharing experts tend to have three common characteristics. Let's begin with the first characteristic.

Select subject matter experts with...Expertise

Your experts obviously need to have expertise in the topic. However, this is not always as obvious as it sounds. Their 'expertise' should be:

- **Current and relevant, not out-dated.** Their expertise needs to be relevant to current and future generations of staff, not the past. Some experts became experts before significant changes occurred in your industry (and this doesn't only refer to IT). Demographic, marketplace and behavioural changes in your industry can reduce the use of previous expertise. You need experts who have expertise in how the topic will exist in the future.
- **An acquired skill, not an inherent talent.** Ideally, your experts have expertise which they can transfer. Sometimes you have experts who are great at a topic due to inherent talents like personality or experience which are almost impossible for others to copy. In this case, your expert's success with the topic is due to unique characteristics, not transferrable issues like process, insight or skill.
- **Diverse and well tested, not isolated.** Ideally, your expert has a wide range of experience in your topic. They have developed their expertise over time or in many different scenarios. So their expertise is flexible enough to be used by many other people, and not reliant on a particular set of conditions.

The best expertise can be replicated by others. We don't want expertise which is reliant upon other conditions – historical situations, inherent talent or isolated conditions. The ideal is expertise which is easy to transfer and useful in the future.

Select subject matter experts with...Time

Your experts need to have time to capture their knowledge.

Depending on what you are asking, capturing knowledge may take as little as 30 minutes, or it may take six hours or longer. It's unlikely to be weeks of work, and their contribution can usually be done in parts, but it's not a trivial commitment either.

You should be looking for experts who aren't facing other time management problems. They should be:

- Established in their role, not starting a new role and trying to get on top of things
- Well-resourced so they can readily do their job and not feel under pressure
- Not undertaking too many other internal requests or non-job-related tasks
- In a relatively quieter time of the year for their role (if that exists)
- Available for several weeks and not away on travel or holidays

We want experts who won't feel under too much pressure to devote some of their time to this knowledge capture process. Experts who are already being asked to do too much may view this request with annoyance.

Select subject matter experts with...Attitude

> SOME PEOPLE ARE GREAT AT SHARING. SOME AREN'T. WE NEED EXPERTS WHO DON'T MIND SHARING.

Now, in theory, your organisational culture should reward and celebrate the sharing of knowledge. Perhaps this won't be an issue at all.

However, you may still be building a knowledge sharing culture and you encounter some people are just not willing to share their knowledge. This usually occurs for two reasons:

- **Knowledge is power**. Some people withhold knowledge as they feel their unique ownership of that knowledge makes them more powerful (safer, valuable). This is a classic cultural problem. They feel that their firm rewards those with the knowledge - and does not reward them for sharing that knowledge. Other staff simply like to be the ones with all the knowledge. In any case, these people do not make good experts. The problem with these experts is not just their resentment at being asked to share but, if they do share, they are not forthcoming with information.
- **They are not worthy**. Some people withhold knowledge as they privately don't feel their knowledge is anything special and are embarrassed to share their expertise. It is possible to coach these people to make them great experts and, for some, it becomes a fantastically positive experience. However, we need to be careful that they don't share their knowledge in a timid way. Shared knowledge requires a degree of confidence behind it – you have to believe in your expertise for others to believe in it as well.

We want experts who are:

- Confident in their expertise
- Comfortable sharing their knowledge
- Can share in a passionate manner so that other people naturally want to take advantage of their ideas.

At this point, all you need is the knowledge sharing platform, and you are ready to go.

Case Study: Carroll & O'Dea Lawyers driving operational excellence through customised training

Challenge	Approach	Outcome
As part of its commitment to operational excellence, Carroll & O'Dea Lawyers needed to deliver consistent training effectively to ensure processes were adhered to and that new starters were inducted into the firm as smoothly as possible.	The organisation had limited capacity to commit to more face-to-face training, so it implemented Tribal Habits to create a suite of complementary online learning modules. These modules were quickly created and rolled out to staff.	Carroll & O'Dea's online learning program has greatly bolstered its face-to-face training efforts and has provided an always-available source of knowledge. The quality of training, particularly for new starters, has improved and new employees are becoming more productive in a shorter timeframe.

Established more than 120 years ago, Carroll & O'Dea Lawyers (COD) continues to make a difference for its clients, its people and the community. Over the years, the firm has developed an important knowledge base in the areas of law it operates in and deep relationships with its clients.

A commitment to operational excellence

In 2020, COD continues its dedication to delivering value to its clients by focussing on people, process and technology.

This commitment to operational excellence requires the sharing of knowledge and the delivery of excellence across all aspects of its practice. To achieve this, the organisation invests significantly in the training and development of its workforce.

After a particularly busy period, the team was seeking to support its client-facing workload with its commitment to professional and personal development and began exploring ways to deliver training more efficiently.

An internal review identified the employee induction process, and the optimisation of internal administrative tasks as two areas where standardising a common approach could reap significant benefits. It was thought that delivering training and knowledge through an online platform would enable the firm to improve the induction of new staff and provide valuable training content 'on-demand' to everyone at the firm.

The first objective of the training involved communicating how the firm handled new client enquiries. A process was already in place for how new enquiries were to be addressed and to whom they should be assigned. This is a critical part of the firm's operations, and there was little tolerance for errors.

The second objective was to ensure that the induction of new starters into the firm was as smooth as possible. COD had identified that the weeks and months immediately after a new starter joined were critical to ensuring their ongoing success in the firm. The organisation had a formal, face-to-face induction process in place, and felt this process should be supported and bolstered by an always-available, online offering.

Finding the 'right' fit for online training

COD identified that to achieve its goals in these areas, relevant, business-specific training needed to be created and delivered consistently. Standard off-the-shelf training would not get the job done.

A heavy workload and busy people meant there was little capacity in the organisation to extend any further commitment to face-to-face training sessions, so an always available, online solution was required. As the training was to be created by staff members with multiple responsibilities within the firm, it was critical that the selected solution was simple to use.

After some deliberation, COD decided to bolster its face-to-face training efforts with Tribal Habits. This platform allowed it to create customised online training at a low cost and quickly.

Up and running in 24 hours

Using the Tribal Habits platform, the team were able to rapidly build training modules that directly addressed the learning objectives of its new enquiry handling and employee induction initiatives.

COD's training modules leverage video, quizzes and other interactive elements to engage learners and bring training to life. The customised training created by the team is designed to support and build-on the face-to-face training sessions the organisation already runs. A great deal of the training was built using assets that already existed in the organisation.

> "We had our two training modules created very quickly and were rolling them out almost immediately to our staff. Our internal processes have been brought to life by Tribal Habits and made them accessible at the click of a button."
>
> Sally King
> Director Strategic Communication and Business Development – Carroll & O'Dea Lawyers

The Results

COD's new training modules have been incredibly well-received across the business.

New enquiries are now transferred to the correct team more accurately, and front-line staff have reported that the training has provided them with greater clarity on how to handle enquiries. For staff new to the firm, it has given them a head-start in getting across the way the firm works. It is also an excellent resource for others at the firm who want to learn more about the new systems and platforms being used by the firm at a time that is convenient for them.

COD has also been able to change its end-to-end induction approach and process so that new starters are set up for success from day one. From aligning with organisational culture to reducing the time taken in face-to-face induction training, COD has revolutionised the way it brings new starters into the organisation.

> "We used to spend three hours coaching each new staff member on administrative tasks. Now it's all managed through a short, engaging online course that's available anytime. If anyone is uncertain about anything, they can always ask a colleague or go to a partner for clarity. We've reduced our face-to-face training hours, and we're getting much better results."
>
> Kim Turnbull
> Human Resources Manager – Carroll & O'Dea Lawyers

One of the most clearly defined results of the Tribal Habits implementation is the fact that employees now have a knowledge repository of company-specific information. Any time someone is unsure of a policy or process, all they need to do is log into Tribal Habits and review the relevant training. This has made employees more self-sufficient when it comes to finding answers to their questions and has reduced disruption within the firm.

> "If ever there is a dispute or misunderstanding in either of these areas, it's easy to look back to the training as a reference point."
>
> Kim Turnbull
> Human Resources Manager – Carroll & O'Dea Lawyers

Next steps

After great feedback from the COD senior management team, the organisation is now rolling Tribal Habits training out to more parts of its operations. The team are initially targeting internal processes and have identified several initiatives where online training could be created as a means to share knowledge with external entities.

As part of its commitment to operational excellence and staff development, COD will continue to leverage Tribal Habits as a means to share subject matter expertise, bed down internal processes and to contribute to the personal development of its staff.

> "I believe Tribal Habits can be a big part of the future for a firm like ours. It builds on what we believe will be a strength of a modern law firm in 2020 and beyond – people, process and technology."
>
> John Willey
> General Manager – Carroll & O'Dea Lawyers

What is Tribal Habits?

Tribal Habits is the complete learning platform for modern organisations. We provide online training that's easy to create, engaging to learn and simple to manage.

- **Easy to create**. Allow your staff to share what they know. If you can create a PowerPoint presentation, you can create interactive online training in Tribal Habits.
- **Engaging to learn**. Training your team will love. Tribal Habits leverages video, social learning and interactive elements to inspire employees to make real change.
- **Simple to manage**. Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

What types of organisations use Tribal Habits?

- **5-500 employees**, who may not have any dedicated training resources or existing online learning platform. In these organisations, it is often the business managers or human resources team who looks after training. For these organisations, we offer 'enterprise-level' outcomes but at a far more affordable cost and with a simpler process.
- **500-50,000+ employees**, who may or may not have a learning and development team, but are struggling to keep up with training requests. In these organisations, there is often a huge demand for training but traditional eLearning authoring tools are too slow. For these organisations, we leverage existing resources and supercharge learning output.

Tribal Habits gives us more control over our content in terms of developing and editing it. It's much more responsive than other learning platforms we have used before, where you request changes and it takes a long time to be done. We can just make changes instantly now.

★★★★★

Queensland Human Rights Commission

Tribal Habits is unique in the market as it allowed us to rapidly capture and transfer organisational knowledge via text, imagery, video and interactive elements. It also shares tips from participants, meaning the knowledge captured increases as users complete topics!

★★★★★

SMEC Member of the Surbana Jurong Group

Content creation is easy and fun on Tribal Habits; the system's built-in structure ensures that content is organised in a manner that enables the final output to be exactly what's needed. This gives me great confidence that my training will hit the mark.

★★★★★

MOQdigital. Leading Business Transformation

It would have taken us up to a year to create the topics using a traditional e-learning authoring tool. With Tribal Habits we were delivering amazing training in three months, and we've estimated the cost has been about 25% of what it would have been had we gone with a traditional solution.

★★★★★

Cardno

Tribal Habits' online compliance library has been a game-changer for us. We now have total peace of mind that our people are safe and our brand and organisational reputation is protected. Delivering compliance training online has also saved us a significant amount of time, money and hassle.

★★★★★

Carroll & O'Dea Lawyers

Tribal Habits' video feedback on the topics we created is amazing - really useful suggestions and so easy to follow. People are already loving the training! The system is so easy to use, and the interactive elements have allowed us to make training a lot more engaging. We couldn't ask for anything more.

★★★★★

DV Connect Be heard. Be safe.

What are the top features of Tribal Habits?

Rapidly create online training on any topic

Learners crave relevant training. Tribal Habits allows anyone to build relevant, engaging online training. The content you create will speak to your learners and appear in your branding.

- ✔ Intuitive, fast and powerful building block elearning authoring process
- ✔ Built-in image library (2 million+ images), image editor and video hosting
- ✔ Real-time feedback of your modules from Sage, our digital learning designer
- ✔ Free video analysis of your modules from our expert learning designers
- ✔ Version control, wide range of interactions, uploads/downloads, embeds and more

Modules are responsive to any device, can support WACG 2.1 accessibility to a Level AA standard, are streamed on-demand in a lightweight environment and allow for social learning opportunities between users.

Tap into ready-made modules – branded and editable!

Access 100's of fully editable online courses from Australian compliance topics to personal development courses.

Our training library is more than just a random assortment of videos and articles. Every module is professionally designed, appears in your organisation's branding and is 100% editable by you at no extra cost. Import and immediately use, or create a copy and fine-tune as needed.

Automate training management for online and offline learning

Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. A range of automations and rules make it easy for anyone to manage users and enrolments.

- ✔ Automate due dates, notifications, certified dates and certification
- ✔ Enrol via 10 different methods – spreadsheets, groups, managers, links and more
- ✔ Dedicated manager's view, including enrolments, reminders and emailed reports
- ✔ Dynamic training catalogue, which adjusts available modules to suit the learner's role

Add online or offlie events to any module, with calendar bookings, roll-calls, locations or more. Record external knowledge, such as licences, accreditations and qualifications for a complete view of all completed learning.

Go deep with learning data and detailed reporting

Tribal Habits tracks far more than just training completion. You can report on all learning contributions, outcomes and activities.

- ✔ Training completion data for every part of every module
- ✔ Compliance completion and expiry (past and future)
- ✔ Job role tracking for required competencies and skills
- ✔ External training – licences, accreditations, qualifications
- ✔ Continuing education reports by time or points, with custom categories
- ✔ Filter by any user data field and download all data into spreadsheets

What problems can Tribal Habits help solve?

Tribal Habits offers complete online training solutions for your organisation on any stage of the journey. We typically help organisations with five key solutions through the learning journey.

Manage training online

Organisations waste a great deal of time delivering the same training over and over. Offline management of training is time-consuming and frustrating, and issues with version control mean your staff could be accessing information that is no longer accurate.

Tribal Habits remedies these challenges by providing a 'single source of training truth'. Reporting is simple and powerful, while automation and reminders drastically reduce the administrative burden associated with managing training.

Meet compliance needs

Compliance training is a vital part of your organisation's strategy, protecting your staff and boosting the bottom line. From building a culture of safety to helping managers develop strong and inclusive teams, compliance training is a critical part of your reputation.

Tribal Habits' library of engaging, interactive compliance training is fully approved by Australian lawyers. Our library can be supplemented by self-created compliance topics using a simple drag and drop editor, providing you with a comprehensive online compliance training solution.

Convert existing training

If you're already running face-to-face training and workshops with PowerPoint presentations and facilitator-led engagements, you've done the hard work. Moving your training content online is a breeze with Tribal Habits.

Open up a world of new learning opportunities by moving away presentations and documents, and away from the logistical challenges of face-to-face training. Unlike a traditional learning management system, Tribal Habits has a completely integrated online training creation toolset.

Optimise employee induction

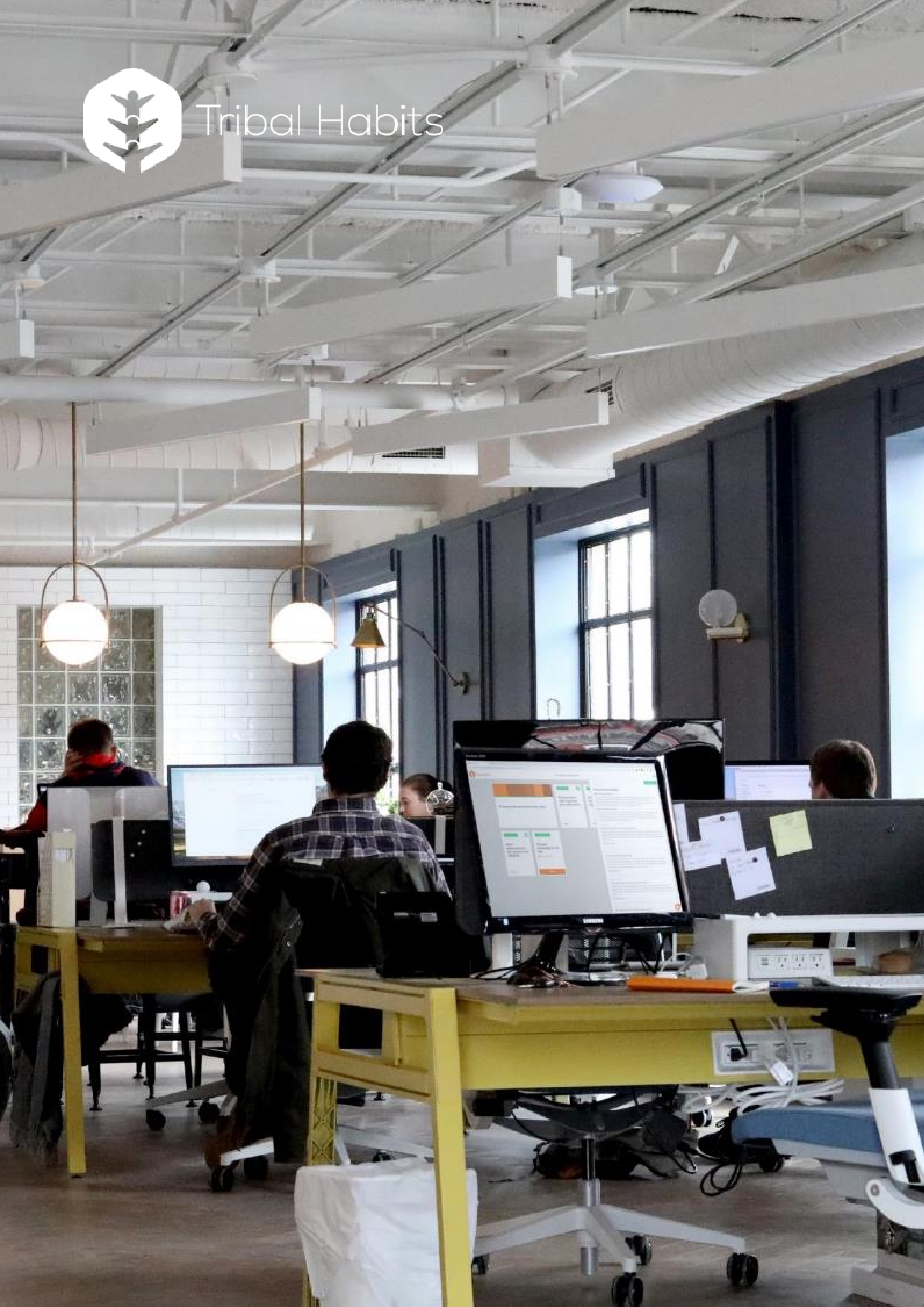
How new employees are brought into an organisation matters. Optimising employee induction reduces employee churn, engages staff, reduces rework and makes new starters productive in far less time.

Tribal Habits optimises employee induction by delivering induction learning pathways that align new starters to organisational culture and processes, while bringing them up to speed as quickly as possible with consistent, repeatable training.

Share best practices

Over time, your top-performing employees have developed unique skills and approaches. Successful organisations capture and transfer this knowledge increasing the capability of their workforce and protecting again the loss of critical knowledge as staff move on.

Tribal Habits' simple drag and drop editor allows anyone in your organisation to create learning experiences based on their unique knowledge. These experiences can be shared across your team, broadening the organisation's knowledge base and turning best practice into everyday practice.


Tribal Habits

How does Tribal Habits boost online training?

How does Tribal Habits make training easy to create?

If you can create a PowerPoint presentation, you can create online training in Tribal Habits.

1. **Start by importing from a library**. Tribal Habits has two libraries of world-class training content ready to be imported into your portal. From Australian online compliance training to personal development training, we have you covered. Our library topics appear in your branding and seamlessly plug-and-play with any training modules of your own. Access instant training content or complement internal knowledge.
2. **Start from a training template**. Creating your own training in Tribal Habits is simple. Start from one of our commonly used online training templates, or simply begin from scratch. Our building block editor makes capturing knowledge as easy as creating a PowerPoint presentation. Except now you have interactive online learning, complete with tracking and reporting! You can also upload existing elearning from legacy formats including SCORM, xAPI, AICC and cmi5.
3. **Start by following a guided process**. Tribal Habits provides a fully guided process to create online training that ensures you capture the information that is most pertinent to your organisation. Our online training building block editor allows Tribal Habits to automatically format all your training content. You can also tap into free advice from our experts to ensure your training is on point.
4. **Allow us to lend a hand**. Call on the experience and expertise of the Tribal Habits team to get the job done for you. Whether it be updating and transferring old material or starting from scratch, we're here to help. We can provide advice on training curriculums, transfer existing training content or run briefing sessions with your internal experts to motivate and inspire their efforts.

How does Tribal Habits make training engaging to learn?

Tribal Habits' modern interface leverages video, social learning and interactive elements to inspire employees to make real change.

- **A modern learning experience**. Today's organisation is mobile, agile and responsive. That's why Tribal Habits is available 24/7 and performs on any device. It's like using a modern website, not an old-fashioned slide show. Tribal Habits user interface is sleek, intuitive and requires no training. We automatic adapt content to your brand standards, including modules from our ready-made libraries.
- **Social sharing and peer learning**. Reflection questions encourage learners to periodically share thoughts with other learners to improve knowledge retention and foster a feeling of social learning. Tribal Habits can share insights that other users have gleaned through their learning journey. These connections enhance the learning experience by providing context and social proof.
- **Move from theory to practice**. To facilitate the flow of information from theory to practice, Tribal Habits actively prompts users to implement what they learn into their day-to-day jobs (and feedback about outcomes achieved). The best performing teams are those that continuously practice and reinforce what they learn in training. Tribal Habits understands this and includes built-in features to support implementation.

How does Tribal Habits make training simple to manage?

Easy enrolments and powerful automation remove the burden of managing training. Detailed reporting provides insights on real outcomes.

- **Automate the mundane**. Tribal Habits removes the administrative burden of managing training. We want you to focus on unlocking great training content and connecting employees and knowledge. Simply enrol staff in pathways, and our set-and-forget admin panel automatically sends training prompts to users and tracks training progress and knowledge transfer throughout your organisation.
- **A single view of training**. Tribal Habits is your repeatable, foolproof approach to training. Do away with spreadsheets, folders, emails, PDFs and slides, all containing different information and no completion data. Online training provides the same experience to every employee, every time, in any location. Tribal Habits' version control ensures staff access only the latest information at all times.
- **Detailed reporting and analytics**. Tribal Habits reporting goes way beyond simple topic completion tracking. Two-way communication and feedback loops allow staff to comment on what they've learnt and the effectiveness of training. Reporting shows how new skills have been implemented in day-to-day work and highlights the requirement for further training—filter training data online with interactive graphs or offline via CSV.

What ready-made training can we access?

Here's a <u>sample</u> of the 100s of modules in our library – all in your branding and fully editable.

Communication and Personal Development

- An introduction to emotional intelligence
- An introduction to negotiation skills
- Best practice listening skills
- Building your influencing skills
- Coming back from a big mistake
- Communicating effectively in the workplace
- Communicating with management and stakeholders
- Designing presentations that engage
- Introduction to effective decision-making skills
- Managing and resolving conflict
- Overcoming imposter syndrome
- Overcoming the fear of failure
- Problem solving and creativity
- Professional business writing skills
- Staying productive: Managing internal meetings
- Staying productive: Managing your emails
- Staying productive: Managing your priorities
- Verbal communication: Advanced skills
- Verbal communication: Essential skills

Equal Employment Opportunity (EEO)

- Anti-bullying and anti-harassment for employees
- Anti-bullying and anti-harassment for managers
- Equal employment opportunity for employees
- Equal employment opportunity for managers
- Overcoming unconscious bias
- Sexual harassment awareness

Finance and Regulation

- Anti-money laundering
- Competition/Consumer law: Conduct and Statements
- Competition/Consumer law: Introduction
- Competition/Consumer law: Safety and Warranties
- Fraud and corruption awareness and prevention
- Modern slavery awareness
- Privacy in the workplace
- Whistleblowing awareness for employees

Health and Safety

- Alcohol and drugs in the workplace
- Colds, flu and COVID-19 prevention
- Driver safety
- Duty of care for employees / managers
- Information Security: Employee awareness
- Information Security: Phishing awareness
- Information Security: Social Media
- Injury management for employees / managers
- Managing mental health in the workplace
- Managing slip and trip hazards
- Manual handling safety
- Mental health awareness for employees
- Office and workspace ergonomics
- Risk management for managers
- Risk management for workers
- Safety for children and vulnerable people
- Warden Training
- Workplace health and safety fundamentals
- Workplace incident investigation

Leadership and Management

- Delegating as a manager or leader
- Five successful leadership styles
- Holding productive 1-on-1 meetings with your team
- Managing teams for better performance
- Motivating your staff and teams
- Setting expectations with staff and teams
- The five core skills for leadership
- Transition from employee to manager

Project Management

- Project Management: Overview
- Project Management: Practical ideas
- Project Management: Selecting a framework
- Project Management: Scheduling and deliverables
- Project Management: Tasks, time and resources
- Project Management: Managing communication
- Project Management: Project meetings
- Project Management: Reporting and KPIs
- Project Management: Costs, risks and quality
- Project Management: Scope management
- Project Management: Change management

Remote working

- Interviewing skills: Remote hires
- IT security while working from home
- Managing remote and virtual teams
- Running successful virtual team meetings
- Staying productive: Working at home

Sales and Service

- Best practices in client service
- Building trust in the sales process
- Conducting effective client review meetings
- Confident and effective business networking
- Creating sales momentum and closing more deals
- Defining your ideal client
- Developing a compelling value proposition
- Generating upselling and cross-selling opportunities
- Marketing tactics to help client referrals
- Obtaining client referrals and references
- Sales proposals and engaging writing skills
- Sales proposals and managing the process
- Sales proposals and pitching for success
- Strategies to boost repeat business
- Successfully helping upset clients
- Successfully responding to client objections
- Understanding and managing client expectations
- Understanding the client buying cycle

Talent Management

- Coaching and developing staff
- Creating a personal training plan
- Discussing performance with staff
- Interviewing skills: Advance techniques
- Interviewing skills: Essential skills
- Managing staff training for success
- Managing staff underperformance
- Mentoring: An introduction to being a mentee
- Mentoring: An introduction to being a mentor
- Recognising and rewarding staff performance
- Writing effective position descriptions

How affordable is Tribal Habits?

1 - No upfront fees

It's so easy to get started with Tribal Habits - there are no upfront costs!

- ✔ No set-up fees. All plans have no set-up or implementation fees.
- ✔ No storage fees. All plans have unlimited stored users and training content.
- ✔ No support fees. All plans, including admin training and passionate support.
- ✔ No branding fees. All plans include a private, branded online training portal.

2 – Select your packages

Choose from one of two packages.

Creator

In this package, you gain access to our complete creator toolset. You can create unlimited online training (topics, articles and pathways) on any knowledge important to your organisation.

Creator + Library (Most popular and best value)

In this package, you can not only create your own training, but you gain access to our entire library of ready-made training. Our ready-made training modules are complete online learning experiences, with interactions, media, assessments, templates and more. Library modules appear in your branding and are interchangeable with training you create. With the Creator + Library package you can also edit our library content to rapidly develop custom training for your organisation. It's the best of both worlds – create your own, use our modules or seamlessly customise and combine.

3 - Only pay for actual use

Unlike most learning platforms, we do not charge based on stored users. Our plans are based on 'active users'. An active user is a user in your portal who logs in during a calendar month. Active users are counted on their first log in each calendar month and can then login as much as they like, to create or complete as much training as they like.

For example, if your organisation has 500 employees, but only 200 tend to login in each month, you only need a 200 monthly active user plan. Don't worry if you overrun your plan either – you are simply charged for the incremental extra users for that one month at the same monthly rate. **Active user plans can cut your training costs by 30-50% (compared to stored user plans).**

4 – Select a monthly or annual subscription

Then just select a payment plan to suit your needs.

- Monthly plans suit organisations with less than 75 active users per month. You pay for actual use each month, which keeps costs flexible and aligned with your value. Monthly plans start from $7.50 per active user per month.
- Annual plans offer discounted, and predictable, annual costs. You pay for 12 months of active users in advance. Annual plans start from 100 active users per month ($5.50 per active user per month) and increase in multiples of 50 users.

How secure is Tribal Habits?

We take security seriously at Tribal Habits. We want you to feel Tribal Habits is a safe and trustworthy portal for your staff, clients and prospects to build a community of knowledge.

- Constant vulnerability testing, including during code development and from third party security firms (including annual penetration and vulnerability testing by external firms).
- We are hosted by Amazon Web Servers and take full advantage of their security and infrastructure capabilities (including DDOS protection, IAM monitoring and full backups).
- All data is encrypted in transit and at rest using industry standard encryption. Geographic filtering is available to restrict user access from specified countries.
- Our Security Policy, Security Practices, Incident Response and Acceptable IT Use documentation are available for review – just contact us for a copy.
- Tribal Habits is fully SAML 2.0 compliant and integrates with compatible Single-Sign-On platforms (Azure AD, Okta, OneLogin and more) for additional user security.

A good starting point for a security review is our online Security FAQs.

How easy is it to implement Tribal Habits?

Very easy.

1. First, your trial portal will become your live portal. This means most of the initial set-up for your portal is already complete during the trial. In fact, the workload to implement Tribal Habits is far less than other online platforms and can be measured in minutes.
2. Second, you can import (and update) users and existing training records via spreadsheet or enable single-sign-on to auto-create new users. In either case, establishing your initial users takes minutes. Most of the work will be in preparing a spreadsheet of your users to upload.
3. Third, importing topics from our libraries and establishing initial pathways or enrolments takes minutes. Topics are imported in seconds, and it takes less than a minute to activate some due dates, notifications and reminders of each topic. Similarly, you can upload existing training content in SCORM (or similar format) in minutes.
4. Fourth, when it comes to creating your own online training, Tribal Habits will be faster than any other alternatives. We have template topics, guided processes, pre-formatted content, built-in feedback and free human reviews. We'll shortcut you from paper-training to interactive online modules in hours or days - not weeks or months.
5. Fifth, you receive private Zoom training sessions on both creating training content and managing your training processes. We have an extensive knowledge base of support articles, built-in modules on using the platform, live admin chat (during Australian business hours) and regular Town Hall webinars with the Tribal Habits community.

You can continue reading about on-going support after your initial implementation online.

How can I get started with Tribal Habits?

A quick demo will give you everything you need to know about Tribal Habits and how to make it a success within your organisation. After the demo, you'll have access to a free, full-featured trial portal to you get started.

There's no catch. You're not signing up for pushy sales calls and endless emails. There's no obligation or credit card required. Your trial is hosted on Amazon servers. We really just want to show you how Tribal Habits works. We think you're going to love it.

Go to https://tribalhabits.com/get-started/ to organise your demo.

Other Tribal Habits Guidebooks

Manage Training Online

[Examine a step-by-step guide to saving time, money and hassle with an online learning platform in this 60-page guidebook](#).

Spread over three parts, you'll learn:

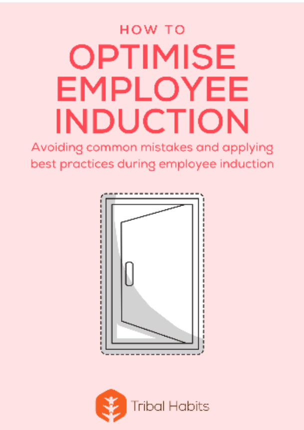
1. Why you should manage training online
2. Which online learning platform suits your organisation
3. How to implement a learning platform

Deliver Compliance Training

[This guidebook outlines the steps to build an easy, affordable and effective online compliance training strategy.](#)

Over two details sections, you'll learn:

1. Why you need compliance training, including key reasons to support your business case
2. How to implement an online compliance training strategy, including detailed topic checklists

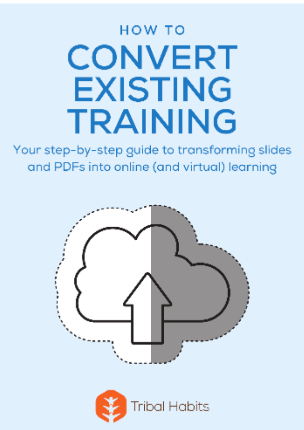


Optimise Employee Induction

[In this guidebook, we review how to avoid common mistakes and apply best practices during employee induction.](#)

Split into two parts, you can learn:

1. Why your organisation needs induction training and how to build the business case
2. How to optimise employee induction training with both online and offline strategies



Convert Existing Training

[This guidebook outlines a step-by-step guide to transforming slides and PDFs into online training.](#)

With three detailed chapters, you'll learn:

1. Why offline content should be converted to online training
2. How to map out a plan to convert content to online
3. How to manage virtual training for blended learning

Reduce Training Costs

[In this guidebook, you can review tips and tricks to set a training budget and maximise your training expenditure.]

Over seven detailed articles, we examine how to set a training budget, the most common costs of training (and how to reduce or eliminate them) and examine more cost-effective ways to deliver training than expensive traditional methods.

Tribal Habits Success Stories

[In this guidebook, get inspired by real-life success stories from leading organisations across Australia as they use Tribal Habits to improve their learning.]

There are detailed examples of real implementation in compliance, induction, best practices and converting existing training materials.

Tribal Habits Training Libraries

[In this guidebook, you can review the entire range of ready-made training modules in the Tribal Habits Foundation, Development, Compliance and Template libraries.]

See how quickly you can be activating our ready-made training modules in your organisation's branding.

