Do You Wiki?

Using Wikis in Information Organizations

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WHAT IS A WIKI?

◈ A wiki is a piece of, "…web-based software that supports concepts such as open editing, which allows multiple users to create and edit content on a website."

◈ "It grows and changes at the will of the participants."

Dalkir, 2011, p. 285

WHAT IS A WIKI?

◈ An interlinked set of web pages.

◈ Crucially, anyone in the user set can edit the pages and delete, add, or correct information on the wiki.
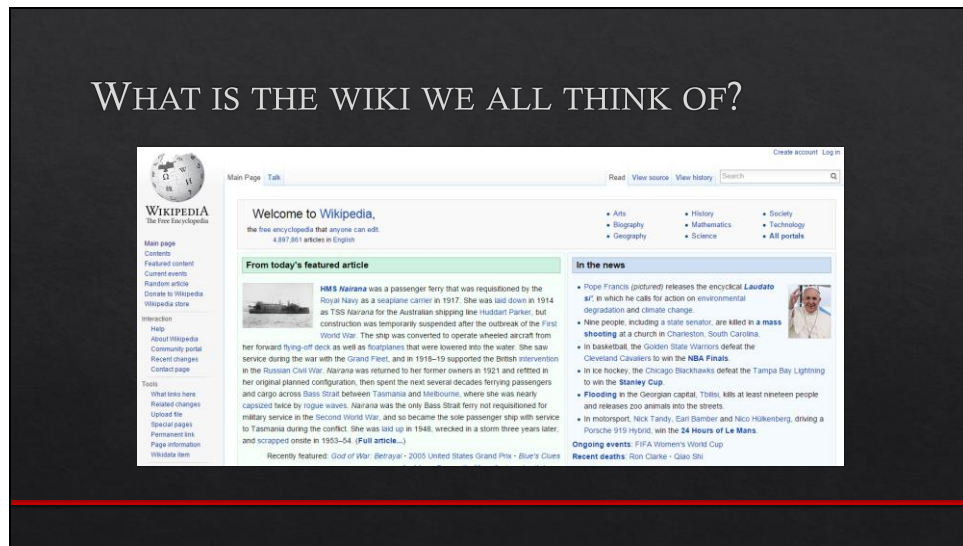
Dalkir, 2011, p. 285

What is a wiki?

◈ A wiki, "…combin[es] [i]nternet applications and websites with human voices."

Dalkir, 2011, p. 286

- Key point – Users can contribute and collaborate remotely, even world-wide
- Retail customer service can interact with users via wikis

- Not a trick question!
- A public wiki
    - In a lot of ways the community is self regulating
    - The community polices itself (Dalkir, 2011, p. 288)

How is an enterprise wiki different?

◈More secure

◈More navigation and help features

◈Often not free software

◈Not self-regulating

Dalkir, 2011, p. 288
https://www.apqc.org/blog/3-huge-problems-your-enterprise-wiki-it-s-not-what-you-think

• Arrow – this is where we come in!

WHY USE AN ENTERPRISE WIKI?

◇Controlled access

◇Integration with current systems

◇Integration with current culture

◇Knowledge management

https://www.apqc.org/knowledge-base/documents/enterprise-wikis-overviews-tools-used-knowledge-management-km

- Controlled access
  - The organization can control access, via access levels, edit levels, view levels
  - Can make certain parts public
  - IP concerns (keep material internal)
  - Mistakes can be disastrous (ie/ chemical industry)
- Systems integration – ie/ within SharePoint
  - Single sign on (SSO) login (same login across all systems)
  - Cross reference with directories, enterprise search
  - Seamless user experience crucial
- Culture integration – collaborate across the organization without email chaos
  - Key is to establish organization culture guidelines for things like the number of wikis, who edits, etc.
  - Integrate it into workflows – so it's not a "chore" to use it
- KM – implement it as part of the holistic KM strategy – helps support communities of practice
  - Needs to be more than just a company dictionary
  - Help to gather tacit knowledge assets in the company – ie/ lessons learned, best practices, part of offboarding and retiring procedures, expert knowledge, knowledge transfer
  - Help gain context on enterprise content
  - Facilitating project collaboration
  - Meeting management – ie/ minutes, presentations and materials – encourage cross-linking

WHAT ARE SOME KEYS TO SUCCESS?

◇Strategy

◇Change Management

◇Measurement

https://www.apqc.org/blog/3-huge-problems-your-enterprise-wiki-it-s-not-what-you-think

- Strategy – Why do we want one?
    - Who is it for?
    - How are we going to use it?
- Change management
    - Roles and responsibilities
    - Integrate with workflow
    - Communicate across the company to promote the wiki and build its credibility
- Measurement – (relevant!) metrics to assess what's working or not
    - Helps to garner attention and get buy-in
    - Helps secure original and ongoing funding

LET'S DO IT!

SET YOUR GOVERNANCE

◇ Roles and responsibilities

◇ Types of content

◇ Content life-cycle

◇ Be flexible!

- Crucial pre-work
- Roles & responsibilities
  - For example:
    - Content management (accessible and up to date)
    - Technical support
    - Contributors
    - Authorizers of content
    - Senior management champion and project owner
  - Full list of roles will depend on your organization
- Types of content
  - What is your use case?
    - Ie/ Co-op – how-tos to help with the onboarding of new co-op students, especially without a senior co-op student to help train the new one
- Life-cycle
  - Records management principles
  - How often do you check content for relevance?
  - What are the steps for deciding to delete content?
- Flexibility
  - As the wiki grows, you have to be flexible to grow your governance with it
  - Re-evaluate governance on a regular basis

SET YOUR BOUNDARIES

⬥Who can see what? Who can edit, and what?

⬥What are the contribution expectations?

⬥How do you monitor the info for correctness?

https://www.apqc.org/knowledge-base/documents/trends-enterprise-wikis-building-and-maintaining-wikis-work

- Access levels
    - Based on staff level?
    - Will privileged information (like budgets, HR information) be included on the wiki?
- Contribution
    - Is it optional? If not, what info is mandatory to go in the wiki?
    - Will usage be part of performance reviews? If so, how do you ensure managers are following up?
- Correctness
    - Great way to engage subject matter experts (SMEs) by engaging them to monitor relevant content
        - (literal) stamp of approval establishes the credibility of the information

- Champion
  - Someone in senior management or higher that is on-board
- Communication
  - Make people understand why it will help them work better and smarter
- Wikithon – Based on the hackathon (where people collaborate intensively on software projects)
  - Way to gain momentum and *keep* momentum and interest
  - Where content owners, CoP members, and other interested users collaborate intensively on creating wiki content
  - Wikipedia version is the editathon
  - A special event (from a few hours to a few days) where people create and edit wiki content
  - Great way to get new people involved – make it a safe space to experiment
- Rewards for top contributors – ie/ wiki guru of the month
- Gamification – Hamari & Koivisto
  - It refers to "technologies that attempt to promote intrinsic motivations toward various activities by employing design characteristics to games."
  - ie/ taking things that are often part of games (like competition with others and scoring points) and applying them to another activity that you want to get people to do
  - For example:
    - Badges
    - Thanks/like buttons on pages
    - Leaderboards for top contributors

- If you and your team aren't doing what you're asking people in the company, it *will be noticed.* This is the fastest way to get people to not buy-in!
- For example:
    - If you are asking people to record meeting minutes on a wiki but your team still takes them in Word and uploads the file, you're not doing what you're asking the users to do.
    - If you are asking people to record meeting minutes directly into the wiki, not copy and paste them out of Word, yet you still record in Word and paste in, you're not doing what you're asking the users to do.

BARRIERS TO ADOPTION

◈What do I put in the wiki?

◈I'm afraid to mess something up!

◈I don't have any time!

https://www.apqc.org/blog/3-huge-problems-your-enterprise-wiki-it-s-not-what-you-think

- Content
  - Strong governance and good communication can mitigate this, especially backed up by great user support
- Fear – especially among novices and new users
  - Set up "guiding questions" to help guide users
  - Encourage participation through making small edits to reformat and "beautify"
    - You don't have to write an essay to contribute!
  - Set up templates and guides to use
    - Do the hard work for people (ie/ set up a table) that people can copy out of the template page and paste into their own page
  - Training shouldn't be more than an hour –
    - If people need more time, the platform may be too hard
  - Really encourage people to "take the plunge" themselves, not delegate
- Time/incentive – work on buy-in
  - Talk to your champion
  - Work flow integration and relevant content – time to re-evaluate?

3 Big Challenges

◈Sustainability

◈Accessibility

◈Credibility

https://www.apqc.org/blog/3-biggest-problems-facing-internal-wikis

- Sustainability
  - Is contributing to the wiki in the regular flow of work? Or do people have to make an effort to go there and use it?
- Accessibility
  - Beyond AODA requirements, can employees find wiki content they need quickly and easily? Or is it a pain to use?
- Credibility
  - Do users trust the content in the wiki?

SET UP THE WIKI

◇Play around with your software!

◇Loose structure first

◇Scaffolding

◇Plant seeds

◇*Content* matters first

https://www.apqc.org/blog/got-sharepoint-got-troubles

- SharePoint is "finicky"
    - "A powerful feature of SharePoint is its flexibility; the biggest drawback of SharePoint is its flexibility" – SP article
- Loose structure first
    - Don't over-organize as the content will partially dictate how things unfold
- Set up scaffolding to help guide people toward starting points and inspire more content
    - Scaffolding is putting "placeholders" for pages that you'd like people to create
        - Use SharePoint wiki syntax [[PageName|This is what is displayed on the wiki.]] and then users can create the page themselves
        - Users can add to the scaffolding too
    - Never an empty page
        - If you actually create a page that you don't intend to fill, put a placeholder there to indicate what should go there
    - Plant seeds so people can go in and add what they know or build upon what someone else has put
- Content
    - It's better to have "ugly" pages with great info than beautiful pages with bad or no info
    - Great way to engage new users by encouraging them to make great content "pretty"

SET UP THE WIKI

◇Regular reviews

◇Basic guidelines for users

◇Surface and associate

◇Publish and point

◇Make it a magnet

Many thanks to Daniel Lee for introducing me to Surface & Associate, Publish & Point.

- Review
  - Refer to your governance
- Basic guidelines
  - Set up guidelines for formatting, how to name pages, etc.
  - Not prescriptive, but a helpful place to start
  - Include how-to documents for the platform itself
    - ie/ how to insert a picture into a wiki page
- Surface & associate
  - Don't lock content away in Word files and shared drives!
  - Make it into wiki pages, if applicable, and interlink the pages
  - Beware of "deep" structures
    - It's better to have a large but well-laid out home page than bury your content layers deep where people can't find it
- Publish & point
  - Don't send things as email attachments!
    - Publish it as a wiki page and then point to the page as a link in the email
- Magnet
  - Post exclusive content
  - Post content that people need to routinely use

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