Customer PLAYBOOK FOR

DIGITAL KNOWLEDGE CAPTURE AND TRANSFER FOR BPO/KPO

Using Articulate 360

Contents

INTRODUCTION

In today's competitive environment businesses are under tremendous pressure to maintain profitability, BPO service providers are expected to add more value in lesser time and at minimal cost. BPO service providers are need to become Process Experts and provide best of breed solutions aligned to the Customer organizational strategy and processes.

Initial stage of transitions requires BPO service provider spending significant time and effort in Interviewing Customer resources to capture technical and business knowledge on multiple processes.. This is a manual process and requires SMEs at both BPO and Customer end to invest time detailing the processes and validating captured information with multiple touch-points, hand-offs across different stages of the transition.

Once the process knowledge has been captured, Customer SMEs are expected to train the BPO service provider resources extensively and provide support during guided processing while continuing to manage their day to day tasks. This results in high dependency on Customer SMEs and increased workload thereby impacting service delivery in the Customer retained organization.

This Playbook has been developed keeping in mind the following key objectives:

Provide one point digital solution to help simplify and automate the knowledge journey involving knowledge capture and transfer

First time right knowledge capture to minimize the need for travel and reduce customer dependency

Provide simulation based learning to the resources to reduce the overall learning curve and enhance knowledge effectiveness

Key tasks within the transition journey where there is a high degree of involvement from Customer resources

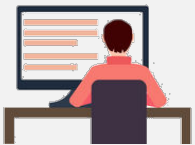| Project Initiation	Solution Identification	Knowledge Transfer	Pilot Production
Alignment of key customer SMEs	Review and approve Knowledge Transfer Plan (including ramp-up training plan)	Impart process knowledge	Travel to service provider location for guided production floor support
Demo of end to end processes	Logistics and set-up for onshore knowledge transfer	Assess and certify service provider resources for pilot	Final standard operating procedures review and approval
Review and validate process maps and standard operating procedures		Query resolution and refresher trainings	
Approve Pre-Knowledge Transfer Plan		Standard operating procedures review and approvals (including exceptions)	

DIGITAL ASSET OVERVIEW

In our constant endeavor to improve the transition journey and to reduce dependency on our customers, Customer has identified a Digital Asset called **"Articulate"** which offers a one point solution to help simplify and automate the overall knowledge journey involving knowledge capture and knowledge transfer.

Articulate is a rapid authoring tool that helps in creating highly interactive online and mobile courses—One time captured content generates multiple outputs:
- ✓ *Word SOP document*
- ✓ *Videos*
- ✓ *Simulations*
- ✓ *Assessments*

Key benefits of the Digital Asset:

- Faster and first time right knowledge capture

- Ability to incorporate existing documentation, web recordings into final output

- Ability to publish output in multiple formats
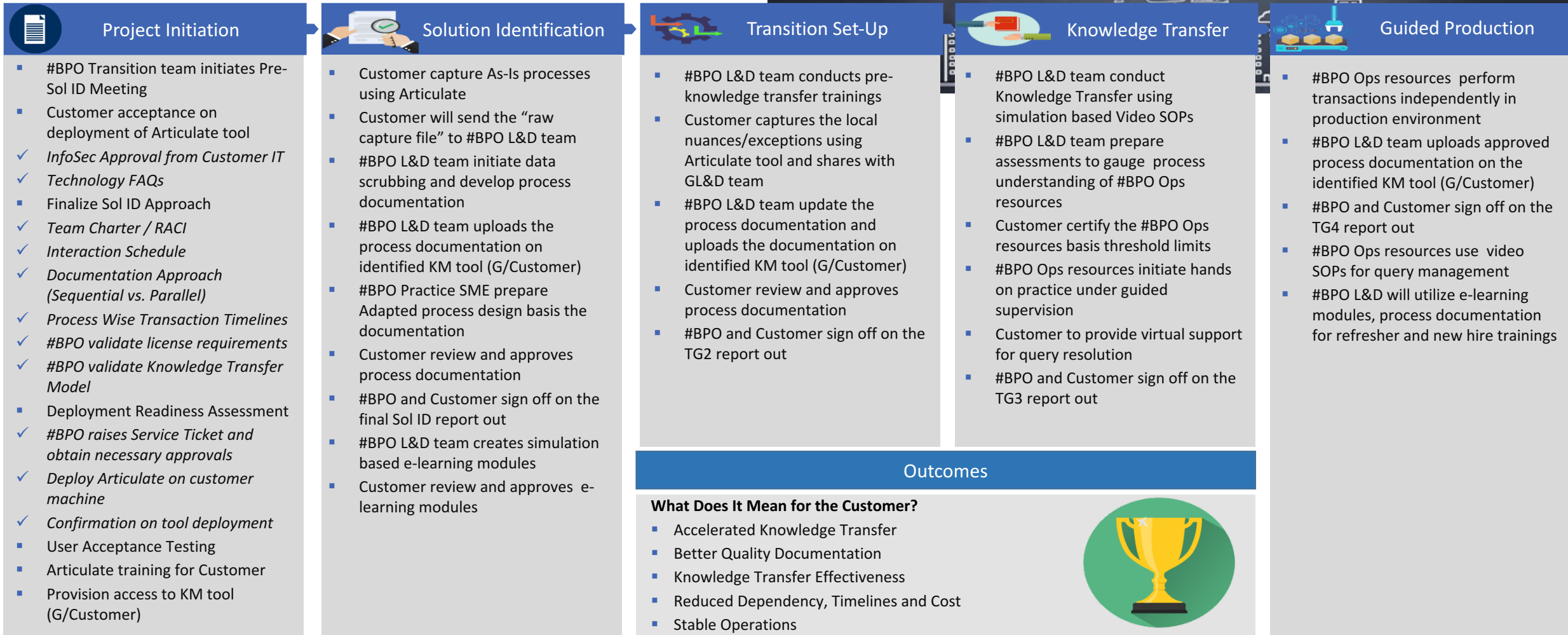
  - Reduced customer dependency for knowledge dissemination

  - Effective knowledge base to enable accelerated knowledge transfer

  - Simulated environment for hands-on-experience

  - Assessments to test training effectiveness

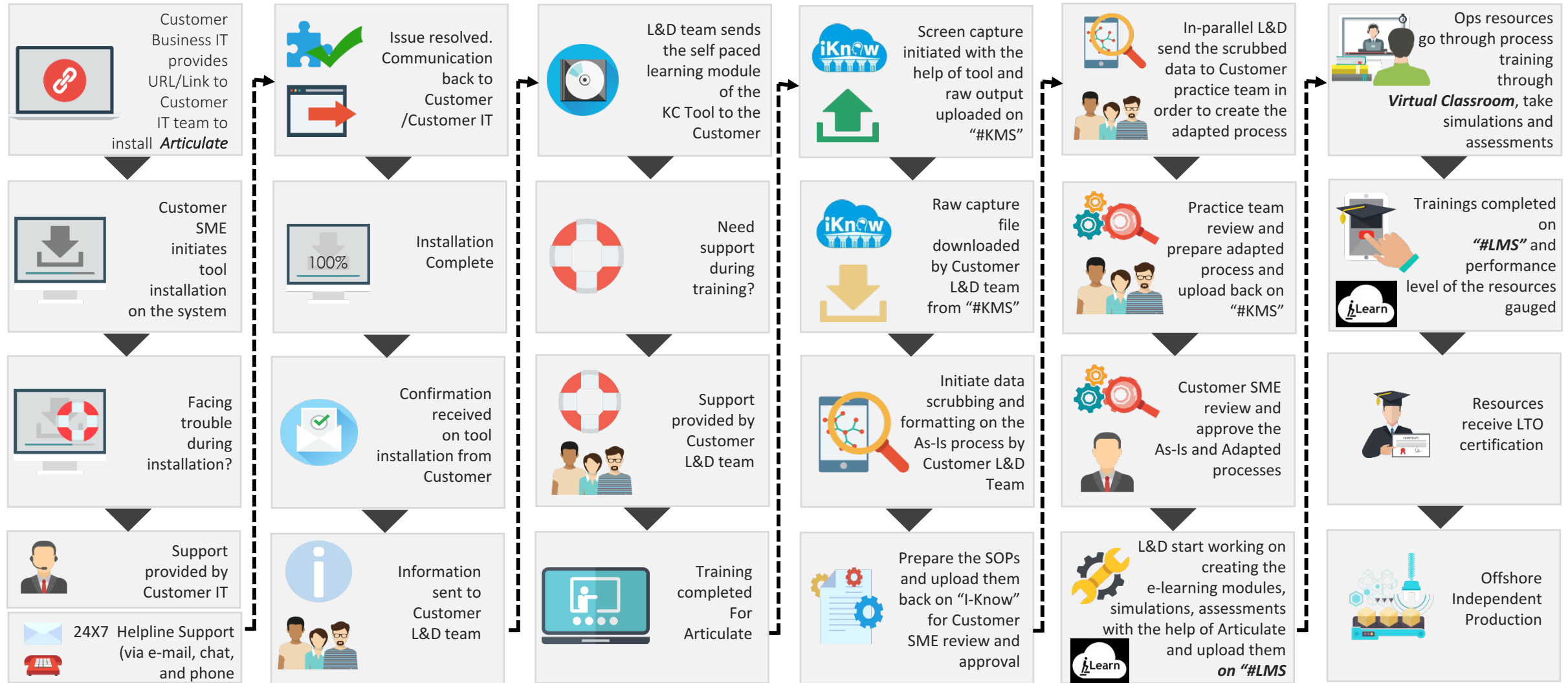- Reduced time and effort for SOP review and sign-off

EASY AUTHORING

INTERACTIONS AND ANIMATIONS

ARTICULATE

MEDIA AND SIMULATION

ASSESSMENTS

PUBLISHING

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Customer FRAMEWORK FOR DIGITAL KNOWLEDGE CAPTURE AND TRANSFER

Project Initiation	Solution Identification	Transition Set-Up	Knowledge Transfer	Guided Production

Project Initiation

- #BPO Transition team initiates Pre-Sol ID Meeting
- Customer acceptance on deployment of Articulate tool
- ✓ *InfoSec Approval from Customer IT*
- ✓ *Technology FAQs*
- Finalize Sol ID Approach
- ✓ *Team Charter / RACI*
- ✓ *Interaction Schedule*
- ✓ *Documentation Approach (Sequential vs. Parallel)*
- ✓ *Process Wise Transaction Timelines*
- ✓ *#BPO validate license requirements*
- ✓ *#BPO validate Knowledge Transfer Model*
- Deployment Readiness Assessment
- ✓ *#BPO raises Service Ticket and obtain necessary approvals*
- ✓ *Deploy Articulate on customer machine*
- ✓ *Confirmation on tool deployment*
- User Acceptance Testing
- Articulate training for Customer
- Provision access to KM tool (G/Customer)

Solution Identification

- Customer capture As-Is processes using Articulate
- Customer will send the "raw capture file" to #BPO L&D team
- #BPO L&D team initiate data scrubbing and develop process documentation
- #BPO L&D team uploads the process documentation on identified KM tool (G/Customer)
- #BPO Practice SME prepare Adapted process design basis the documentation
- Customer review and approves process documentation
- #BPO and Customer sign off on the final Sol ID report out
- #BPO L&D team creates simulation based e-learning modules
- Customer review and approves e-learning modules

Transition Set-Up

- #BPO L&D team conducts pre-knowledge transfer trainings
- Customer captures the local nuances/exceptions using Articulate tool and shares with GL&D team
- #BPO L&D team update the process documentation and uploads the documentation on identified KM tool (G/Customer)
- Customer review and approves process documentation
- #BPO and Customer sign off on the TG2 report out

Knowledge Transfer

- #BPO L&D team conduct Knowledge Transfer using simulation based Video SOPs
- #BPO L&D team prepare assessments to gauge process understanding of #BPO Ops resources
- Customer certify the #BPO Ops resources basis threshold limits
- #BPO Ops resources initiate hands on practice under guided supervision
- Customer to provide virtual support for query resolution
- #BPO and Customer sign off on the TG3 report out

Guided Production

- #BPO Ops resources perform transactions independently in production environment
- #BPO L&D team uploads approved process documentation on the identified KM tool (G/Customer)
- #BPO and Customer sign off on the TG4 report out
- #BPO Ops resources use video SOPs for query management
- #BPO L&D will utilize e-learning modules, process documentation for refresher and new hire trainings

Outcomes

What Does It Mean for the Customer?

- Accelerated Knowledge Transfer
- Better Quality Documentation
- Knowledge Transfer Effectiveness
- Reduced Dependency, Timelines and Cost
- Stable Operations

DIGITAL KNOWLEDGE CAPTURE AND TRANSFER PLAYBOOK 2019

The below schematic maps out the end to end knowledge journey during the transition lifecycle starting with Installation of the Digital Asset on Customer Machine, Capturing Process Knowledge, Developing Training content, uploading it on Customer knowledge management portal (#KMS), disseminating the knowledge to Customer resources remotely via Simulation based learning and eventually gauging their performance through knowledge assessment portal (#LMS)

Customer Business IT provides URL/Link to Customer IT team to install *Articulate*	Issue resolved. Communication back to Customer /Customer IT	L&D team sends the self paced learning module of the KC Tool to the Customer	Screen capture initiated with the help of tool and raw output uploaded on "#KMS"	In-parallel L&D send the scrubbed data to Customer practice team in order to create the adapted process	Ops resources go through process training through *Virtual Classroom*, take simulations and assessments
Customer SME initiates tool installation on the system	Installation Complete	Need support during training?	Raw capture file downloaded by Customer L&D team from "#KMS"	Practice team review and prepare adapted process and upload back on "#KMS"	Trainings completed on *"#LMS"* and performance level of the resources gauged
Facing trouble during installation?	Confirmation received on tool installation from Customer	Support provided by Customer L&D team	Initiate data scrubbing and formatting on the As-Is process by Customer L&D Team	Customer SME review and approve the As-Is and Adapted processes	Resources receive LTO certification
Support provided by Customer IT / 24X7 Helpline Support (via e-mail, chat, and phone)	Information sent to Customer L&D team	Training completed For Articulate	Prepare the SOPs and upload them back on "I-Know" for Customer SME review and approval	L&D start working on creating the e-learning modules, simulations, assessments with the help of Articulate and upload them *on "#LMS*	Offshore Independent Production

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RACI MATRIX

| | | R – Responsible | C – Consulted |
| | | A – Accountable | I – Informed |

		BPO IT	Customer IT	BPO L&D	BPO Ops	BPO Transition	Customer SME	BPO Practice SME
Project Initiation	Initiate Pre-Sol ID Meeting				C / I	R / A		C / I
	Acceptance on Articulate tool deployment including InfoSec approval	C	R / A	I	I	I	R / A	I
	Finalize Sol ID approach (Team Charter/Interaction Schedule/Documentation Approach/Process wise Transaction Timelines/validate knowledge transfer model)	I	I	C / I	C / I	R / A	R / A	C
	Validate license requirements	I	I	R / A	I	I	C	I
	Raise Service Request for tool installation including approvals	C	I	R / A	I	I	I	
	Articulate tool deployment on customer machine	R	R	A	I	I	I	
	User Acceptance Testing	C	R / A	R / I	I	I	R	
	Training customer resources on Articulate tool			R / A	I	I	R	
	Access to Knowledge Management tool (G/Customer)			R / A	I	I	C	
Solution Identification	Capture As-Is process			A	I	C	R	C
	Share "captured content/raw file" output			A	I	I	R / A	
	Initiate data scrubbing and develop process documentation			R / A	I	I	C	
	Upload process documentation on identified KM tool (G/Customer)			R / A	I	I	I	I
	Prepare adapted process design			C	I	I	C	R / A
	Review and approve process documentation			C	I	I	R / A	C
	Final Sol ID Report Out			C	C	R / A	C	C
	Create simulation based e-learning modules			R / A	I	I	C	C / I
	Review and approve e-learning modules			A	I	I	R	I

RACI MATRIX CONTINUED…

		BPO IT	Customer IT	BPO L&D	BPO Ops	BPO Transition	Customer SME	BPO Practice SME
Transition Set-up	Conduct pre-knowledge transfer trainings			R/A	I	I	C	I
	Capture local nuances/exceptions			A	I	C	R	C
	Upload process documentation on identified KM tool (G/Customer)			R / A	I	I	I	I
	Update the process documentation and uploads back the updated documentation on the identified KM tool (G/Customer)			R / A	I	I	C	
	Review and approve updated process documentation			C	R/A	I	R / A	C
	Final TG2 Report Out			C	C	R / A	C	
Knowledge Transfer	Conduct Knowledge Transfer (using Video based SOPs) including nuances			R / A	R	I	C	
	Prepare & conduct assessments to gauge process knowledge			R / A	R	I	C	
	Certify the resources basis threshold limits			R / A	I	I	C	
	Initiate hands on practice under guided supervision			A	R	I	C	
	Virtual support for query resolution			A	R	I	C	
	Final TG3 Report Out			C	C	R / A	C	
Guided Production	Perform transactions independently in a productive environment			C	R / A	I	C / I	
	Upload final/approved process documentation on identified KM tool (G/Customer)			R / A	I	I	I	
	Drive use of video SOPs during guided production for query management			R / A	R	I		
	Final TG4 Report Out			C	C	R / A	C	
	Utilize e-learning modules, process documentation for query management, refresher and new hire trainings			R / A	R		C / I	

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SOP CREATION AND VALIDATION PROCESS

Robust standard operating procedures are critical deliverables during a transition and are instrumental in ensuring successful knowledge transfer to a BPO service provider. Customer will leverage its digitally enabled knowledge capture and transfer framework to enable first time right knowledge capture and remote knowledge transfer there by reducing strain on Customer resources during the transition journey.

Project Initiation	Process Demonstration & Knowledge Capture	Document Creation	Review , Correction and Sign-off	Creation of Training Content	Training and Certification
Articulate will be installed on Customer SME system	During Solution Identification Customer SMEs capture As-is process Captured content is transferred from Customer machine to #BPO L&D resource using Customer/ #BPO KM Tool	BPO L&D resource will edit captured content #BPO L&D resource will publish the content as Word /Video SOP #BPO L&D resource upload revised SOP on KM Tool	Customer reviews the documents and provide feedback/sign-off	#BPO L&D resource will create E-learning modules, Simulations and assessments #BPO L&D resource will publish the approved content on Customer / #BPO KM Tool	#BPO L&D resource will utilize the E-learning modules, Simulations and Assessments to train #BPO Ops resources and certify them for Guided Production

Tools used during knowledge transfer

The below tools are deployed during knowledge transfer to augment capture of standard operating procedures

WebEx. While the tool is widely leveraged for virtual training and meeting purpose, the recorder helps to capture process and the player to be leveraged for training purpose, be it for new or existing employees for knowledge retention purpose.
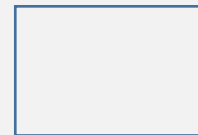
Visio

#KMS. It is the SOP management tool at BPO. SOPs are documented using an authoring tool and the same is uploaded into #KMS. The SOPs are then shared with the ISP over an email for validation and the feedback is shared with Customer. This tool does not need installation on customer systems. The customer is given licenses for #KMS and they can author as well as approve SOPs on the tool itself.
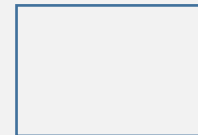
#LMS. It is cloud based the best-in-breed, global LMS that enables Customer Learners to adopt new-age, collaborative and advanced methods of learning to continuously deliver superior business impact.

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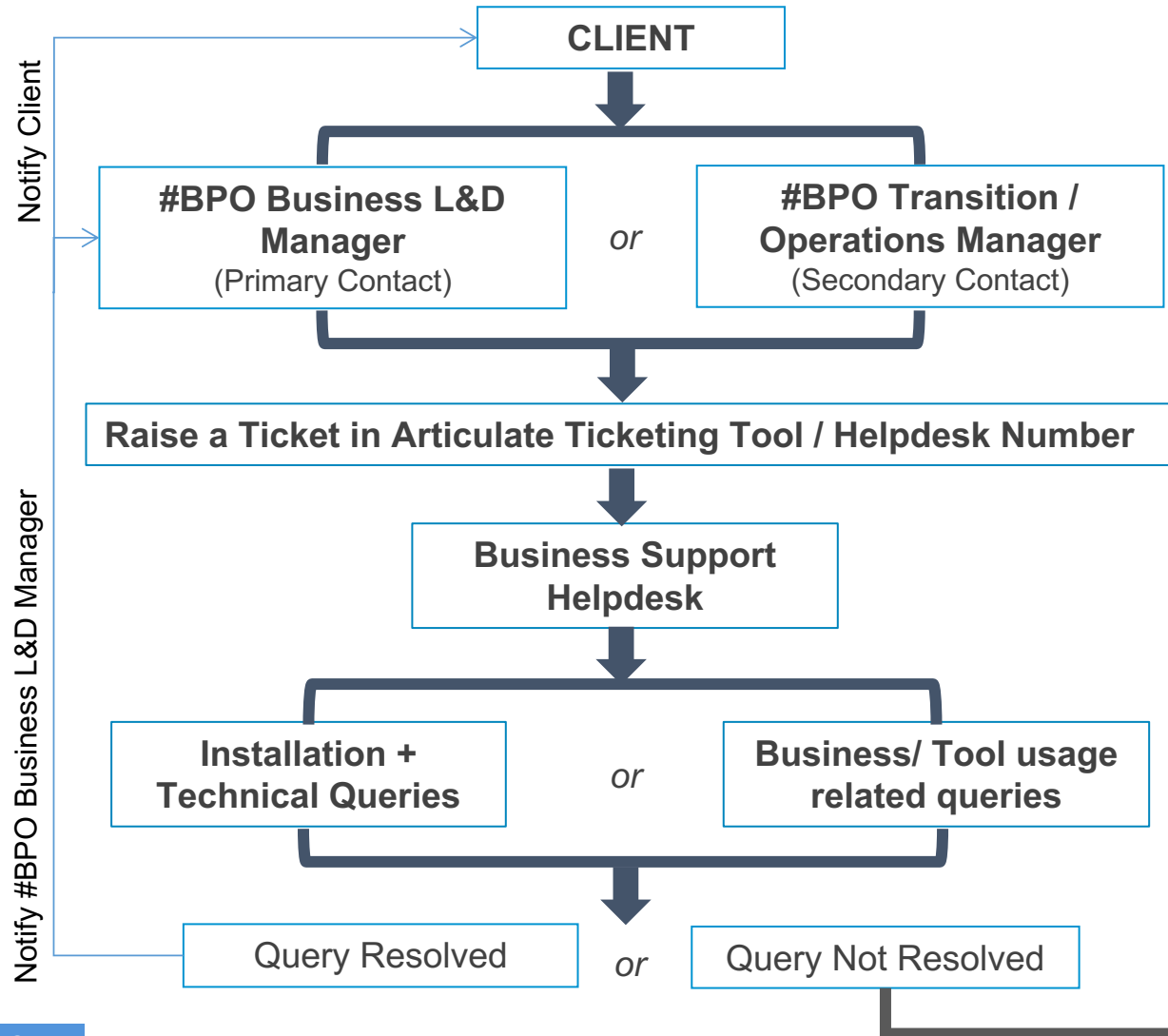## Customer KNOWLEDGE CAPTURE AND TRANSFE[R] SCENARIOS

Scenarios and Description	Installation and Knowledge Capture	Document Creation and Approval	Knowledge Transfer
Remote Knowledge Transfer (Customer Machine Accessible) ▪ Customer permits Articulate to be installed on their machine ▪ Customer SME views Customer SME screen via WebEx	▪ Articulate will be installed on Customer SME system ▪ Articulate recording will be activated by #BPO L&D resource to commence capture ▪ Capture will be stopped by #BPO L&D resource once demonstration is concluded ▪ Raw capture file will be uploaded on #BPO/ Customer KM Tool for editing	▪ #BPO L& D resource will edit the "raw capture file" and add their thoughts and notes. ▪ Edited "raw capture file" will be published as Word SOP, Videos, Simulations etc. and uploaded on #BPO/ Customer KM Tool for Customer SME review and feedback ▪ Customer SME will review and provide feedback ▪ #BPO L&D resource will make changes (if any) and share the revised SOP for Customer SME approval ▪ Once all SOPs, Videos, Simulations and Quizzes are approved by Customer they will be published on #BPO/ Customer KM Tool ▪ Quiz will be created using approved SOPs to gauge process knowledge of #BPO ops resources	▪ #BPO L&D resource will utilize approved Video SOPs for remote knowledge transfer ▪ Use Assessment feature to assess and certify #BPO Ops resources on process knowledge
Remote Knowledge Transfer (Customer Machine Not Accessible) ▪ Customer does not permit Articulate to be installed on their machine ▪ Customer SME views Customer SME screen via WebEx	▪ Articulate will be installed on #BPO L&D resource system ▪ Articulate recording will be activated by #BPO L&D resource to commence capture ▪ Capture will be stopped by #BPO L&D resource once demonstration is concluded ▪ Raw capture file will be broken into parts and annotations will be added at appropriate places, image additions may also be done ▪ Raw capture file will be uploaded on #BPO/ Customer KM Tool for editing		
Existing Documentation or WebEx Recordings available ▪ Customer does not permit Articulate to be installed on their machine ▪ Customer only willing to share existing documentation, PowerPoints, or WebEx recordings of the process	▪ #BPO L&D resource will store existing documentation, WebEx recording on his machine ▪ Articulate will be installed on Customer L&D Resource system ▪ #BPO L&D resource will convert existing documentation, WebEx recordings to mp4 video format using the converter software in the tool. ▪ #BPO L&D resource will then use Articulate's inbuilt video editor to extract relevant chunk of video within the file ▪ #BPO L&D resource can also re-enact the process, and capture the process afresh while launching it from their machine to create a more suitable raw capture file		

Customer KNOWLEDGE CAPTURE AND TRANSFER SCENARIOS CONTINUED…

Scenarios and Description	Installation and Knowledge Capture	Document Creation and Approval	Knowledge Transfer
Onshore Knowledge Transfer (Transactional Knowledge Capture) ▪ Quarantine Zone: Customer L&D resource has no laptop, sitting with Customer SME with their standalone system with no internet access	▪ Customer installs a Desktop on their network in a Quarantine zone with access to relevant systems and applications ▪ Articulate will be installed on Customer SME system ▪ Articulate recording will be activated by #BPO L&D resource to commence capture ▪ Process capture will be stopped by #BPO L&D resource once demonstration is concluded ▪ Raw capture file will be uploaded on #BPO/ Customer KM Tool for editing *Note: Internet is not required during capture, internet is only required during license activation and deactivation*	▪ #BPO L& D resource will edit the "raw capture file" and add their thoughts and notes. ▪ Edited "raw capture file" will be published as Word SOP, Videos, Simulations etc. and uploaded on #BPO/ Customer KM Tool for Customer SME review and feedback ▪ Customer SME will review and provide feedback ▪ #BPO L&D resource will make changes (if any) and share the revised SOP for Customer SME approval ▪ Once all SOPs, Videos, Simulations and Quizzes are approved by Customer they will be published on #BPO/ Customer KM Tool ▪ Quiz will be created using approved SOPs to gauge process knowledge of #BPO ops resources	▪ #BPO L&D resource will utilize approved Video SOPs for remote knowledge transfer ▪ Use Assessment feature to assess and certify #BPO Ops resources on process knowledge
Onshore Knowledge Transfer (Contextual Knowledge Capture) ▪ No systems or applications used in the processing ▪ Task explained using PowerPoint, Excel templates etc.	▪ Articulate will be installed on Customer L&D resource system ▪ Base documents will be imported into Articulate Project. Alternatively the illustration of project will be done in the articulate slide itself. This will create a raw capture file	▪ The process will be illustrated using articulate features and by adding appropriate images and objects. Layers, States and Motion path will come handy in doing the illustration. ▪ Annotations will be added to emphasize key business points. ▪ Additional images and characters will be added to narrate the process. ▪ Videos of machinery etc. can be embedded and annotated and further emphasized to make the visualization of physical process ▪ Voice over will be added for explaining contextual knowledge	

ISSUE REPORTING & ESCALATION PROCESS

Notify Client

CLIENT

#BPO Business L&D Manager
(Primary Contact)

or

#BPO Transition / Operations Manager
(Secondary Contact)

Raise a Ticket in Articulate Ticketing Tool / Helpdesk Number

Notify #BPO Business L&D Manager

Business Support Helpdesk

Installation + Technical Queries

or

Business/ Tool usage related queries

Query Resolved

or

Query Not Resolved

ESCALATION STRUCTURE

Level 3 — **#BPO Vertical L&D Leader or #BPO Master Transitions Leader / Global Operating Leader**

Level 2 — **#BPO Business L&D Leader or #BPO Transitions Leader / Service Delivery Leader**

Level 1 — **#BPO Business L&D Manager or #BPO Transitions / Operations Manager**

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FAQ's

Q1. Does the installation of Articulate require approval from the IT Information Security Team?
Yes, a sign-off from your IT Information Security Team will be required before deployment of Articulate.

Q2. How do I Install Articulate on a Desktop or Laptop?
Customer IT will provide the link to download the Articulate software along with the Installation Guide. One has to just click on the Articulate Storyline 2 file to start the installation. It is a 4 step easy installation and takes about 15 minutes.

Q3. What is the required system configuration?

Hardware Requirements	Software Requirements	Content Format
- CPU 2.0 GHz processor or higher (32-bit or 64-bit) **Memory 2 GB minimum** **Available Disk Space 500 MB minimum** - Display 1024 x 768 screen resolution (1280 x 800 or higher recommended) - Multimedia Sound card, microphone, and webcam to record video and/or narration	- Operating System Windows 10 (32-bit or 64-bit) - Windows 8 (32-bit or 64-bit) - Windows 7 (32-bit or 64-bit) - Windows Vista (32-bit or 64-bit) - Mac OS X 10.6.8 or later with Parallels Desktop 7+ or VMware - Fusion 4+ .NET Runtime Microsoft .NET Framework 4.0 or later (gets installed if not present) - Adobe Flash Player Adobe Flash Player 10.3 or later	- Flash Adobe Flash Player 10.3 or later, and one of the following browsers: - Windows: Internet Explorer 8 and later, Microsoft Edge (latest - version), Google Chrome (latest version), Firefox (latest version) - Mac: Safari 7 and later, Google Chrome (latest version), Firefox (latest version) - HTML5 Windows: Google Chrome (latest version) - Mac: Safari 7 and later, Google Chrome (latest version) - Mobile: Safari in Apple iOS 7 and later, Google Chrome (latest - version) in Android OS 4.1 and later - Apple iOS Articulate Mobile Player in Apple iOS 7 or later on iPad - Android OS Articulate Mobile Player in Android OS 4.1 or later (optimized for tablets)

Q4. Does the installation require Open Internet?
Yes, Internet is required during license activation and deactivation.

Q5. Will Articulate interfere with our systems in the network environment?
Articulate Tool does not Interfere with any of the IT systems (as revealed by IT InfoSec assessment within Customer IT environment).

Q6. What is the average file size for a 1 hour recording from Articulate?
1 hour of recording via Articulate=50 MB of File Size, however, it is recommended to capture the process in a bite-size chunks of 15-20 minutes

Q7. Who will train our staff on Articulate usage?
Customer L&D team will provide basic training to your staff on tool usage

Q8. Can we import existing PowerPoints, WebEx recordings on Articulate Storyline 2 to create SOPs?
Yes, you can import existing PowerPoints, WebEx recordings into Articulate to create SOPs.

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