



**DEMYSTIFIED:  
EMPOWERING TEAMS AND  
UNLEASHING POTENTIAL**

UNLEASHU

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# Introduction

Welcome to UnleashU's eBook: Demystified: Empowering Teams and Unleashing Potential. This eBook describes our journey to create an Empowerment & Demystification System - our innovative approach to problem solving and navigating the complexities of workforce development. We have spent ten years developing a system to create a resilient workforce, one that is self-reliant and one that embraces continual learning and development. All without expensive and over-bearing micromanagement.



As leaders and managers, you are aware of the challenges in hiring skilled resources, retaining top talent, solving complex problems and fostering innovation. This eBook will show you how we have addressed these critical issues and showcase for you how our transformative journey can also be adopted by you to unleash the full potential of your organization.

Starting with a note about us, UnleashU, we will talk about our humble beginnings; how we started out to inspire and support the next generation of entrepreneurs. Our work in that domain led us to founding Wholestack Solutions, an IT Services firm that then set us towards the path of creating our Empowerment and Demystification System.

Today, UnleashU offers Empowerment Services – we have a team called co-pilots who support a myriad of services from demystifying Cisco ISE for organizations; creating knowledge artifacts, simulations and learning journeys to better help organizations understand this technology and many other technologies. We also provide leadership level oversight of full technology stacks. But we are just getting started. We believe our ability to demystify, problem solve, document and share knowledge applies to all parts of the business organization, technology or otherwise.

## MOVING BEYOND LEGACY THINKING

This eBook is not about overwhelming you with technical jargon nor focusing on outdated and irrelevant 'best practices.' We will not dive into the minutiae of server components nor detailed technology engagement protocols. Instead, the stories and recommendations in this book are here to inspire you to move beyond legacy thinking and embrace a future-oriented mindset. We all know that the rate of change is fast and only increasing. The time to prepare and address that with a resilient and self-reliant workforce is now.

By sharing the struggles that have shaped us we hope to connect our past challenges with your present challenges and tell you – you too can overcome them!

Understanding our history is important – not because we are special or unique, quite the opposite. But because we are just like you – our journey looks just like yours. Our journey has been filled with challenges and triumphs that have shaped the Empowerment & Demystification System we have today. By reflecting on our past and sharing these challenges with you, you can mirror how your organization can create the same foundation and reap the benefits of our system and our process of empowerment.

## KEY INGREDIENTS: BELIEF, AUTHENTICITY, AND EMPATHY

There are three key ingredients we need to share with you before you get started on this journey: belief, authenticity, and empathy.

### Belief

We went on this journey because we believed that tomorrow could be better than today. We believed that continuous improvement was possible. We believed that we could keep up with the pace of change and that we could bring people into our ecosystem and unleash their potential. This belief is what drives us to innovate and push boundaries. Challenges are merely opportunities to get better. We ask you to start there. With belief that tomorrow can be better.

### Authenticity

We have experienced the same challenges you face day in and day out firsthand. We are not just promoting our way of thinking; we are living proof of its effectiveness. We are not selling something because we get great margins from it or big discounts from our partner-vendors. This is us – this system is who we are. We are authentic because we follow this system every single day.

### Empathy

We understand the pain points of people just like you because we have faced similar challenges. This empathy allows us to connect with you, our reader, and our clients on a deeper level and offer solutions that truly address your needs.

This eBook is not simply our history nor a repository of the struggles we faced and overcame. Understanding our origin story will help you appreciate – you are not alone. The challenges you face are very real and very solvable. It is our hope that our story instills in you a belief in a better future.

We start most of our content and stories here at UnleashU with a simple question: Why? So let's start there.

Why did we write this eBook? One of the founding principles of UnleashU is "share the knowledge love." In the beginning, we determined it was important to document our processes, participate in collaborative sessions, and to share knowledge – but as we went through these tactical activities, we discovered that doing these things made our work easier and our team more self-reliant. This core-value, to share the knowledge love, drove us to create this eBook and help inspire others to make hard work, easier – and help you unleash your team's potential. We are a purpose-driven organization, one that is compelled to help ideate a better future and participate in creating it.

## UNLEASHING POTENTIAL

Our goal with this eBook and with our services – with all that we do – is to help others Unleash their Potential. It is our mantra and raison d'être, or reason for being. Our hope is that we can play a small part in transforming your organization, making it more resilient, innovative, and capable



of handling future challenges. We do not believe that business nor life is a zero-sum game. We believe that a rising tide raises all ships. And if our content and our services can help one reader make tomorrow better than it was today? We can count ourselves a successful organization. By playing a small part in helping other ships rise, we believe we will create better businesses, business relationships and a better future for all impacted.

With that, we invite you to join us on this transformative journey. Let's explore how an Empowerment and Demystification System can revolutionize your approach to management and lead your organization to new heights. Together, we can make hard work easier, foster innovation, and create a brighter future for your team.

## CHAPTER ONE

# The Start of an Idea

This eBook is designed to take you through our evolution, from our humble beginnings to the creation of our groundbreaking Empowerment & Demystification System. Whether you're a manager, a leader, or someone striving to bring innovation to your organization, this journey will provide you with the insights and foundation you need to tackle the challenges of hiring skilled resources, retaining talent, creating self-reliant teams and driving innovation.

To truly understand the idea of Empowerment & Demystification and how we created our system, we need to start at the beginning. Our story is not just a series of milestones; it is a testament to our commitment to making hard work easier and empowering everyone within our community. Initially, we did not set out to create a marketable service around Empowerment. We were focused on building a better company for our internal employees, a system that encouraged continuous learning and skills enhancement. A system that allowed for sharing knowledge and creating the conditions for success.

As we refined our internal processes over the last decade, we had an epiphany: the capabilities we were developing could help anyone unleash their potential—not just our employees, but also our customers and partners...our community! This realization was the foundation of us launching Empowerment Services, a concept that evolved from our earliest pursuit of simplifying the complex and redefining what's possible.



Our journey began as a company called 18out. This initiative aimed to accelerate a startup's success. We did not want to support startups only through financial investment but instead through resource investment. We wanted to support founders and help them manage the numerous aspects of launching a startup. Early-stage companies have all the trappings of a large organization – accounting, taxes, payroll, technology, Human Resources – on and on. Founders are often overwhelmed not with the idea they want to bring to market, but by the details of trying to run a business.

18out sought to work alongside these founders to simplify complex tasks. This foundational DNA of making hard work easier and fostering learning has been a constant theme in our evolution.

As we approached founders, we kept receiving asks to support them in their technology endeavors, an expensive and critical part of every business. And so, we launched Wholestack Solutions – a company focused on supporting technology for others. While Wholestack delivered on an outsourced IT Support model, our goal was always to be collaborative in our approach to support delivery.

We provided traditional outsourced IT services and professional project work, all while keeping our core mission in sight: unleashing potential. Despite our growth, we faced common organizational challenges such as siloed information and expensive, yet insufficiently skilled, resources.

Which leads us to what is likely the first common thread between our journey and yours – just like us, you likely struggle with keeping up with all the changes within the technology domains. You likely struggle with keeping your team up to date on changes in the technology or how to fully leverage expensive systems that also need to contextually address what your organization needs. We understand these pain points because we, too, faced them.

We encountered multiple issues with siloed information. Knowledge was often hoarded by individual experts, creating bottlenecks and outright frustrations between team members. Junior resources were asked to lean in and provide coverage, but they lacked the expertise to do so – all while our senior resources refused to provide teaching and guidance to them. This created resentment, frustration and ultimately, impacted our ability to be a cohesive team supporting our customers.

We had an engineer who was skilled in a highly critical part of technology. This individual was called on repeatedly by customers and internal team members to solve issues. Leadership asked this individual to train others, to create a run book to help us when this engineer wasn't available. This person refused. While out on vacation, a customer experienced an outage requiring this engineer's skillset. The engineer was furious that we called while they were out of the office. But we had no choice. They decided to be a bottleneck by refusing to empower others and set them up for success – and so, this engineer had to live with the consequences of doing so.

This was just one example of how siloed information created enormous friction within our organization and our employees.

This story and many other similar situations caused us to conclude that to truly empower our team, we needed to turn individual knowledge into collective knowledge. This insight was the first step in shaping our ideas around Empowerment. While demand for our services grew, we also found ourselves slamming into the market demand for technical resources. Hiring skilled resources proved expensive in both the time it took to recruit and onboard as well as the financial cost of hiring these resources.

Another common theme that we know you struggle with as well.

Further, upon investing and hiring these expensive resources, we often found that even they had gaps in their knowledge, and these gaps created more friction and inefficiencies. We hired unified communications subject-matter-experts, who then refused to help support any other technologies because that 'is not my job.' Not only was knowledge siloed, but individuals chose to silo their work as well.

After going through weeks of interviewing, negotiations and finally hiring – we were excited to bring in a new resource. Only to have those new hires quickly become disenfranchised, frustrated and looking for a new job. What caused this quick souring of the opportunity? Our onboarding was unstructured. In-fighting between various team members led to the new hires being confused about how to get the information they needed. Training delivered by senior resources was lackluster and half-hearted. And once the new hire went through "onboarding training" they were still ill-prepared to deliver on expectations – leading to even more friction and a perpetual cycle of blame.

As lines in the sand were drawn over not sharing knowledge and not learning other parts of the technology stack – leadership grew exasperated at how to deliver services in such a fragmented and siloed culture.

Over the last decade, we have solved that messy problem. We invested in continuous learning, upskilling and reskilling. We have ensured that our team can keep up with rapidly changing technologies; as well as expand their capabilities beyond narrowly defined individual silos. This approach not only filled skill gaps but also aligned our team culturally, fostering a more collaborative environment. But more on that in future chapters.

Our “aha” moment came years later when we recognized the broader market need for the system we had developed internally. While delivering Managed Services to our customers, we had many conversations about the complaints and frustrations of their own silos, their own knowledge gaps. These stories sounded like our own. We saw an opportunity to address the skills gap, to teach organizations how to demystify and problem solve all while empowering those organizations. This realization led to the formal creation of Empowerment Services, built on the principles of continuous learning, knowledge sharing, and collaborative problem-solving.

In the following chapters, we'll delve into the components of Empowerment and discuss how to effectively implement Empowerment within your own organization. Our goal is to provide you with an understanding of how Empowerment can transform your organization and help you navigate the complexities of today's problem-solving landscape.



## CHAPTER TWO

# The Skills Gap and Silver Tsunami

In our previous chapter, we explored the history of Wholestack Solutions and the evolution that led to UnleashU. We discussed the challenges we faced in knowledge sharing, onboarding, and continuous learning. Let's look a bit more at a concept Fortune Magazine coined: "the skills gap and silver tsunami" and how those are going to impact the future of an empowered workforce.

"Back in 2010, the U.S. had around 12 million more unemployed people than it had job vacancies. Despite the ups and downs of Covid, things are more normal now, but we still have a deficit—2.5 million more vacancies than job seekers."

This imbalance, driven by rapid advancements in AI and other technologies, has led to what is now being called a "skills gap." This term refers to the massive requirements and capabilities that workers will soon need to stay relevant in their roles. Coming out of a university or training centers now serves only as a foundation – without continual learning efforts, our newly hired resources today will be obsolete in a short timeframe.

Many of you may have experienced this in your own careers. At Wholestack Solutions, we certainly did. We hired many individuals with pristine resumes and solid educational backgrounds only to have them quickly reach the end of their capabilities shortly after hiring.

We have seen the same challenge within our customer segments – complaints and frustrations about highly-skilled resources no longer having the skills needed to push their organizations forward. Keeping pace with technological advancements requires a commitment to continuous learning, dedicated time to practice new skills, and opportunities to apply these skills in real-world scenarios. All this must be balanced with the demands of our daily responsibilities.

## THE SILVER TSUNAMI

Fortune Magazine also introduced the term "silver tsunami," which describes the impending wave of retirements among older workers. This phenomenon signifies a significant loss of institutional knowledge and expertise as these experienced workers leave the workforce.

Consider our previously mentioned experience of senior resources hoarding knowledge. Within your organization, how many team members are taking time to document their knowledge? Creating runbooks or how-to guides? How many coaching sessions do senior resources have with more junior resources? We suspect the answer is not a positive one. Many seasoned professionals guard their knowledge as their "secret sauce." As these individuals approach retirement, it is unlikely they will suddenly start sharing their insights and transferring knowledge. More realistically, they will leave, taking their valuable knowledge with them. This creates a substantial gap and risk that organizations must learn to navigate, prepare for and address.

The convergence of the skills gap and the silver tsunami presents significant challenges for organizations. With experienced workers retiring and a shortage of adequately skilled new workers, the need for effective knowledge management and continuous learning has never been more critical.

## MOVING FORWARD

Understanding and recognizing the impacts of the skills gap and the silver tsunami is important when considering business risks. These trends are not only affecting individual careers but also shaping the strategic priorities of entire organizations. Getting caught 'flat-footed' is no longer a plausible excuse. The data is out there and by recognizing these challenges, we can better prepare to meet them head-on. By transitioning to an empowered workforce, we can ensure our teams and organizations are equipped to thrive and become self-reliant and resilient.

In the next chapter, we will explore the various strategies we have seen in the marketplace that attempts to address the knowledge gap. These are often temporary solutions, or "band-aids," and we will examine their effectiveness and limitations. More importantly, we will discuss how UnleashU's Empowerment & Demystification System can offer sustainable solutions to these challenges.

## CHAPTER THREE

# Let's Slap On Some Band-Aids

In our last chapter, we introduced the concepts of the "silver tsunami" and the "skills gap," highlighting how these colliding, market-events are creating significant risks for organizations. In this chapter, we will explore some common band-aid solutions including outsourcing and their limitations.

Let's start with the outsourcing approach. As a Managed Services provider, we have unique insights into the outsourcing model, the pros and cons and the long-term impacts. While we believe outsourcing can address skill shortages, we also know it often fails to provide a sustainable, long-term solution.

For the last few decades many organizations turned to outsourcing to bridge their knowledge and skill gaps. This trend included various models, from full IT outsourcing (ITO) where entire IT departments were managed by external companies, to more targeted approaches where specific functions like routing, switching, or server support were outsourced while the organization itself retained overall oversight. Other models included the rise of virtual staff augmentation and virtual CIOs (vCIOs). These external resources with specialized skills could temporarily fill in the gaps within an organization's capabilities. While these methods provided immediate relief, they often fell short of addressing the root cause of the knowledge gap.

One significant issue with outsourcing is the unintended consequence of the decision itself. The decision is typically made by management without buy-in from the day-to-day employees. This lack of buy-in can create an "us vs. them" mentality, where internal employees view external vendors as a threat to their job security. Instead of fostering a collaborative environment, the dynamic is often times a combative atmosphere where knowledge is withheld. This leaves vendors in the dark and unable to perform effectively.



Wholestack Solutions saw this play out across many of our former customers. The initial kick-off was often collaborative, however, as requests for documentation or needed knowledge were brought to the internal team's attention, those requests often fell on deaf ears. This led to conditions where we, as the provider, were often in the dark about situations and solutions – and getting called out for those misses. Whether it was a simple oversight by the employee group or outright sabotage, vendors are often perceived as a threat and treated as such.

Outsourcing also creates a perception problem for managers. When a vendor succeeds, the credit often goes to the external team, not internal management. Conversely, when the vendor fails, the blame falls squarely on the managers who chose and oversaw the vendor. This lose-lose situation can damage internal morale and trust in management, further exacerbating the divide between in-house staff and external resources.

While outsourcing can temporarily solve the problem of skill shortages, it does not build internal capacity or resilience. Once the outsourcing contract ends, the underlying issues resurface—organizations still lack the necessary skills and knowledge to operate effectively. Additionally, the costs associated with bringing in external resources have only increased, making this approach less sustainable in the long run.

Other band-aid approaches include 'bootcamp' style learning conferences or other external learning opportunities. The greatest challenge with these styles of learning is that the organizational context is not considered. Learners are responsible for taking best practice concepts and bringing those back to their organization to fit into the organization's contextual requirements. Many times, these best practice concepts are quickly discarded due to the amount of variability the organization has.

These kinds of learning environments also exclude practical, hands-on learning that reinforces the key concepts learners are to take away. These learning environments also only present one or two modalities of learning – excluding some learners from absorbing the materials.

Today, there is a shift away from outsourcing core skillsets as organizations seek more control over their work and resources. Employees desire to be empowered; to have the tools and knowledge they need to perform their jobs well, and to feel valued within their organizations. There is a growing demand from internal teams to re-allocate budgets away from external vendors and invest internally.

UnleashU's Empowerment Services offer a sustainable alternative to outsourcing. By focusing on knowledge sharing, continuous learning, and internal capacity building, we help organizations develop the skills they need from within. This approach not only addresses the immediate skill gaps – as our Co-Pilots work alongside your team – but also prepares the organization for future challenges by fostering a culture of continuous improvement and collaboration.



Outsourcing has been a prevalent but ultimately flawed solution to the problems in knowledge and skills gap. While it provides short-term relief, it fails to build the internal skills and resilience that organizations need to thrive in the long term. As the pendulum swings back towards investing in internal teams, UnleashU's Empowerment Services stand ready to guide organizations through this transition, ensuring they have the knowledge, skills, and confidence to succeed.

In the next chapter, we will delve into the specific strategies and components of Empowerment, exploring how they can transform your organization and unleash its full potential.

## CHAPTER FOUR

# A Note on Culture

As we progress through this eBook, it's essential to understand that many of the obstacles and challenges we (and you) face, require fundamental cultural changes to overcome them. It is not just about implementing new processes; it is about embedding these changes into the very fabric of the organization's culture.

Consider a conversation we had with a customer about the importance of documentation. The customer acknowledged the value of documenting but admitted, "Yes, I should be documenting...but I can do that whenever." When asked why he had not done it yet, his summarized answer was simple: he was too busy. This "too busy" problem is symptomatic of a larger issue—a lack of discipline and, more importantly, a culture that does not prioritize accountability in documenting, sharing knowledge, and solving problems.

This is not a unique challenge to this customer nor to us. We suspect you too face similar challenges – your team likely lacks the mental discipline or rigor to routinely document and share knowledge. So, how do you overcome a problem related to discipline? Through culture shifts.

In many organizations, a top-down, heavy-handed approach to change often backfires. It requires excessive oversight and micromanagement, which rarely leads to lasting compliance. We have all seen it. The internal memo was released demanding a change happen immediately and then months later everyone in the organization has moved on to something else – the memo forgotten. A dictatorial style approach rarely creates long-term change.

Instead, a more effective way to implement and sustain change is to integrate it into the organizational culture. This means making the change a collective responsibility, where everyone holds each other accountable.

In the upcoming section on "Sharing the Knowledge Love," we will explore how overcoming siloed knowledge required a cultural change. We realized that making knowledge sharing a part of our culture was crucial. People had to embrace this idea and hold each other accountable rather than relying on leadership to enforce it. If the entire team did not buy into the concept, then the concept would never take root.

Implementing cultural changes can be tricky. It involves subtle shifts in how leadership and management communicate. To begin our own cultural shift, specific phrases, like "Share the knowledge love," became more prevalent in our communication. There was a specific, committed effort across the leadership team to use specific words and ideas continuously for a length of time.

Leadership began to embody the cultural shift, demonstrating its value through their actions. Only when these new behaviors start to take root, and people begin to see the benefits, can the cultural direction be officially announced. At this point, the organization feels a sense of ownership over the change, and they will naturally hold each other accountable.

When implementing your own Empowerment ideas in your organization, demonstrating new behaviors is crucial. We cannot just tell our team, peers, partners, or customers to document processes. We must show them how it is done. By working alongside them and incorporating these activities into our routine, we help them experience the value firsthand. Simply instructing them to document is not enough; experiencing the benefits themselves creates a momentum shift that is much more sustainable.

For UnleashU, as customers see the benefits of these new practices, they will take these learnings back to their organizations, sharing the value with their peers. This process plants the seeds for a cultural shift within their organization. They begin to see documentation and knowledge sharing not as additional tasks but as integral parts of their workflow, leading to greater acceptance and empowerment.

Cultural changes are challenging but essential for overcoming deeply ingrained bad habits. And siloed knowledge is that – a bad habit. Knowledge hoarding is a bad habit. Through consistent communication and accountability activities we can start to slow the momentum of bad habits and steer them in a more positive direction. By embedding new behaviors into the culture, demonstrating their value, and fostering a sense of collective responsibility, we can create lasting change. Empowerment at UnleashU is not just about providing solutions; it's about transforming how organizations think and operate.

Throughout this eBook, we will also provide ideas and recommendations for actionable steps you can experiment with in your organization to effect change.

Here are a few ideas for Embedding Cultural Change:

- **Make Knowledge Sharing a Collective Responsibility:**
  - **Action:** Introduce regular team meetings focused on sharing insights and documenting key learnings.
  - **Implementation Tip:** Encourage team members to present their work and what they've learned during these sessions. Make it a norm that everyone contributes, creating a shared sense of ownership.

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- **Shift Communication to Reinforce New Behaviors:**
  - **Action:** Integrate specific phrases and concepts, like "Share the knowledge," into daily communication.
  - **Implementation Tip:** Leadership should consistently use these phrases in emails, meetings, and casual conversations to reinforce the new cultural direction.

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- **Lead by Example:**
  - **Action:** Leadership should actively demonstrate the desired behaviors, such as documenting processes and sharing knowledge openly.
  - **Implementation Tip:** Use real examples where leadership successfully implemented these behaviors and highlight the positive outcomes in team meetings.

- **Create Visible Accountability:**
  - **Action:** Establish systems where peers can recognize and reward each other for contributing to documentation and knowledge sharing.
  - **Implementation Tip:** Implement a simple recognition system (e.g., a shout-out board or a dedicated Slack channel) where team members can thank others for sharing knowledge.

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- **Start Small and Scale Up:**
  - **Action:** Begin with a pilot group or a single department to implement these changes, then gradually expand across the organization.
  - **Implementation Tip:** Use the success stories from the pilot group to demonstrate the benefits to other departments, building momentum for the cultural shift.

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- **Incorporate Continuous Feedback Loops:**
  - **Action:** Regularly review the effectiveness of these changes through team feedback and adapt as necessary.
  - **Implementation Tip:** Schedule periodic check-ins to discuss what's working and what needs adjustment, ensuring the change process remains dynamic and responsive.

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By taking these steps, you can begin work on embedding the cultural changes needed to overcome challenges like siloed knowledge and lack of documentation. These actions help shift the mindset from individual responsibility to collective empowerment, fostering a more collaborative and effective organization.

In the next chapter, we will delve deeper into specific strategies for implementing these cultural shifts and how UnleashU can support your organization in this transformative journey.

## CHAPTER FIVE

# Sharing The Knowledge Love

In the previous chapters, we explored how outsourcing provided a temporary solution to skill gaps but ultimately fell short of creating sustainable change. We also discussed the growing desire among individuals to have the tools and resources needed to perform their work effectively. And finally, how creating new ways of working require changes in cultural expectations and the implementing of accountability. Now, let's we delve into how Wholestack Solutions responded to these shifting attitudes, particularly in the wake of Covid-19, by fostering a culture of empowerment and knowledge sharing.

The Covid-19 pandemic forced a dramatic shift towards remote work, challenging traditional office dynamics. Our organization had never planned on being a remote organization and overnight we had to learn how to work miles apart – when all we ever knew was in-office. Without the immediate proximity of colleagues for support, our team had to become more self-reliant...which also provided a spark towards empowerment. People wanted to feel capable of solving problems independently, learning new skills, and steering their career paths with greater control. This shift, while initially frustrating, revealed a significant desire across the market. We saw customers and partners struggling with the same asks from their teams but unclear on how to provide solutions in a situation we'd never been in before.

Recognizing this shift, Wholestack Solutions began re-writing its cultural standards. We committed to:

Ending knowledge hoarding

Hiring not just for technical skills but for commitment to continual learning, collaborative potential

Ensuring our growth and development efforts kept pace with technological changes.

The cornerstone of this cultural transformation was the principle we called "Sharing the Knowledge Love."



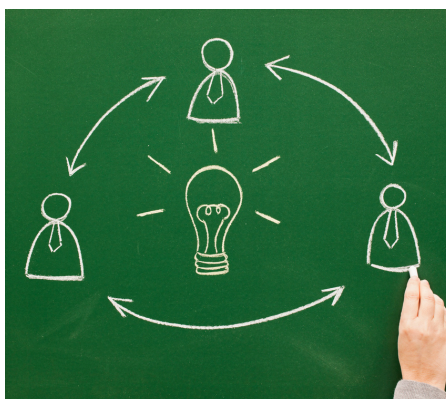
## SHARING THE KNOWLEDGE LOVE

Admittedly, the concept of "love" in a technology organization seemed unconventional at best and sparked outright skepticism. However, we drew inspiration from the teaching profession, where the primary purpose is to share knowledge passionately and selflessly. Teaching is driven by a desire to contribute to others' growth, a sentiment we believed was essential for fostering a collaborative environment at Wholestack.

To embed this new culture, we had to move beyond mere collaboration to true inspiration. We needed to inspire our team members to help each other where they were seeing the act of sharing knowledge as an act of love and charity. Sharing what we've learned, including the pains of that learning, is a selfless act that benefits everyone involved.

This cultural shift was not without its challenges. Some team members, who viewed their knowledge as their "secret sauce," chose to leave, fearing that sharing would diminish their value. And the same may happen to other organizations. However, our experiences have shown the opposite impact for those who chose to stay. Those who embraced "Sharing the Knowledge Love" grew more competent and confident. Teaching a subject matter deepened their understanding and fostered significant personal and professional growth.

And it created ownership for everyone. Instead of the top-down demands that people share knowledge, we have rank-and-file employees excited to share knowledge and holding others accountable for doing the same. This dramatically reduces the cost and expense of micromanagement and oversight tactics. The team self-manages this core principle because they see the value and benefit of both sharing knowledge and having knowledge shared.



While one-on-one learning is powerful, it is also time-intensive and costly. In a one-to-one teacher to student situation, we were investing two hours of resourcing time to receive one hour of learning time. This did not include preparation time by the teacher. Multiply that across dozens of teammates wanting to learn a new skill – and we had an unmanageable scenario.

We again looked to the education space on how to better solve this challenge. We recognized the need to scale our knowledge-sharing efforts to reach a broader audience without losing the personal touch. This realization led us to explore new methods of sharing knowledge from a one-to-many perspective.

Our journey to scale knowledge sharing involved developing systems and processes that allow for efficient dissemination of information. This included creating comprehensive documentation, leveraging digital platforms for knowledge exchange, and developing skillsets that helped each team member become better teachers (and better learners).

Here are some actionable steps to foster a culture of Empowerment and Knowledge Sharing

- Hire for Collaborative Potential and Growth Mindset:
  - Action: When hiring, prioritize candidates who demonstrate a commitment to continual learning and a willingness to collaborate and share knowledge.
  - Implementation Tip: Incorporate behavioral interview questions that assess a candidate's past experiences with knowledge sharing and their approach to collaboration.
- Create Systems for Scalable Knowledge Sharing:
  - Action: Develop systems and processes that allow for efficient knowledge dissemination to a broader audience, such as comprehensive documentation and digital platforms.
  - Implementation Tip: Implement a central knowledge base where all team members can contribute and access information. Use collaborative tools like wikis, shared drives, or dedicated software to maintain and distribute this knowledge.

- **Build Skills in Both Teaching and Learning:**
  - **Action:** Provide training for your team members to enhance their skills as both teachers and learners, ensuring they can effectively share and absorb knowledge.
  - **Implementation Tip:** Offer workshops on effective communication, documentation techniques, and peer mentoring. Encourage employees to practice these skills in team settings and offer feedback.
- **Scale Learning from One-to-Many:**
  - **Action:** Transition from one-on-one learning models to scalable one-to-many approaches, such as group training sessions or recorded webinars.
  - **Implementation Tip:** Record key training sessions and make them available on-demand for all team members. Encourage employees to review these resources and discuss them in group settings to reinforce learning.
- **Integrate Knowledge Sharing into Daily Workflow:**
  - **Action:** Embed knowledge sharing practices into everyday work processes, making it a natural part of the workflow rather than an additional task.
  - **Implementation Tip:** Include knowledge sharing as a regular agenda item in team meetings. Encourage team members to share insights or lessons learned from recent projects or challenges.

By embedding "Sharing the Knowledge Love" into our culture, we have created an environment where team members are inspired to help each other grow, leading to greater competence and confidence. In the next chapter, we will explore specific strategies and tools we have implemented to scale our knowledge-sharing efforts and how these can be applied to empower your organization.

## CHAPTER SIX

# The Knowledge Bases

In the previous chapter, we discussed our cultural shift towards ‘sharing the knowledge love’ and identified the challenges associated with one-to-one teaching and learning. To address these challenges, Wholestack Solutions recognized the need for diverse instructional methods and scalable knowledge distribution. This chapter explores how we implemented multiple modalities of teaching and learning to enhance knowledge sharing across the organization.

Multiple modalities refer to using various instructional methods to teach a concept, engaging learners through different senses and media. Similar again to the education space – we knew that learners came in all different styles. Some learners are visual, others are hands on, and others want to be self-guided. How then do we adapt our methodologies to ensure the knowledge we have is meeting our teammates and learners where they are?

We successfully cleared the first hurdle – recognizing that adult learners are no different than younger students. We needed to adopt multiple modalities to make knowledge sharing more effective. This is indeed a critical first step. Too many organizations ignore the need for multiple modalities and insist that learners adapt to how the material is presented, dismissing large chunks of preferences and learning styles. When the learning engagement fails, leadership points towards the learners when the real failing was in not accepting how diverse learners are.

To begin meeting our team and learners where they were, we started with investigating traditional knowledge bases. This required experimentation and recognizing different platforms that meet different criteria. We began analyzing our various teams and the requirements of each and recognized the need for multiple knowledge platforms to meet the demands of our various teams.

While the team initially bought into the concepts of knowledge bases, our initial assumption that our team would immediately populate these knowledge bases was – incorrect. Creating knowledge is both a skill and a habit, and we lacked both. We lacked discipline.

To instill the habit of documentation, we set quarterly goals for creating a certain number of knowledge artifacts. This initiative aimed to train our team in the importance of documentation and improve their documentation skills. We implemented a system called End Of Day (EOD), where each employee emails the team about something they learned that day and whether they created content. This system reinforced two key principles that we needed to systematize across our organization:

- **Every day presents an opportunity to learn something new.**
- **When we learn something, we should document it and create content about it.**

These activities seek to remove the typical top-down memo that employees must document knowledge and instead provide employees examples to follow. More importantly, these activities provided the opportunity to put ideals into action and experience the benefits of the action. This idea goes back to our chapter about how to effect cultural changes. It was not enough for us to simply dictate employees to document knowledge and share it – we had to create the conditions for the team to be successful in the adjusted expectations and to eventually take ownership and accountability of the new direction.

Accountability was a word we wrestled with for a good long while. For these changes to really “stick” we knew it had to be more than leadership holding the team accountable. We struggled with how to implement accountability where the aim and goal was not to penalize employees and tear them down – but to help team members see the impact they are creating in the organization. To see the impact they are having on their peers and the perceptions that existed about them in the organization. Accountability would also shift responsibility to all team members for building their teammates up. Then they too could experience being built up themselves by the entire organization; creating a positive feedback loop. It was no longer a small management group responsible for constructive and positive feedback for the whole organization. But the entire organization was accountable for feedback.

We introduced a feedback engine to enable both management and peer groups to provide positive and constructive feedback across the organization. Public recognition and praise for creating knowledge motivated those to continue their contributions, while private reminders about documentation gaps helped individuals improve their skills and habits.

Recognizing the need for multiple learning modalities, we also incorporated a video recording tool. Initially, we did not anticipate the power of transcripts and AI in simplifying knowledge creation, but these tools significantly enhanced our documentation process.

Today, a simple recording to show a teammate how to do something can be turned into multiple knowledge artifacts: a diagram, a how-to-guide, visual representation of the solution and a transcript that can be plugged into our LLMs (more on that in a later chapter!). Enormous wealth of content, from simply smashing the ‘record’ button. Multiple modalities of learning and teaching can now be created. And sharing knowledge now feasible in a one-to-many format. Jackpot!

As documentation grew and the team developed discipline around documentation, we thought we were well on our way to a new way of working.

However, a new challenge surfaced: using the created knowledge. The habit of self-reliance was still lacking across the organization. We needed to now shift the team from the old model of asking someone directly how to do something – to consulting a knowledge base or video. This shift required encouragement and further cultural adjustments. Changing this momentum was a journey, because there is indeed enormous momentum around it. “It’s just easier to go ask a question” – you’ve likely heard that yourself. But if we could not get the team to leverage the newly documented knowledge...and decrease their reliance on single individuals? The momentum of the team putting the documentation together would collapse. Why bother to document how-to-guides if people continue to come ask me questions about the very thing I spent time documenting? That is human nature and we knew it was the next problem to solve if we wanted to continue our journey towards an Empowered Workforce.

Scaling knowledge sharing involves more than just creating content; it requires a cultural shift and the adoption of diverse instructional methods. By establishing habits of documentation, leveraging feedback, and incorporating multiple learning modalities, Wholestack Solutions has laid the foundation for a robust knowledge-sharing culture. This approach not only enhances individual skills but also fosters a collaborative and empowered workforce.

Let’s take a look at some actionable steps your organization could take to implement diverse instructional methods and scalable knowledge sharing:

- Adopt Multiple Learning Modalities:
  - Action: Recognize that different team members have different learning styles—visual, hands-on, or self-guided. Tailor your knowledge-sharing methods accordingly.
  - Implementation Tip: Provide resources in various formats, such as written documentation, video tutorials, interactive simulations, and self-paced learning modules. Assess which formats work best for your team and adjust as needed.

- Establish Documentation as a Daily Habit:
  - Action: Encourage a culture where documenting new learnings is part of the daily routine.
  - Implementation Tip: Implement a system like End Of Day (EOD) reports, where team members share what they've learned each day and whether they've documented it. This reinforces the practice of daily learning and documentation.
- Implement a Feedback Engine for Accountability:
  - Action: Create a system where both management and peers can provide positive and constructive feedback on documentation and knowledge sharing.
  - Implementation Tip: Use tools that allow for public recognition of contributions and private feedback on areas for improvement. This helps build a culture of accountability without resorting to punitive measures.
- Leverage Technology for Efficient Knowledge Creation:
  - Action: Use video recording tools to capture processes and tasks as they happen, turning these recordings into valuable knowledge artifacts.
  - Implementation Tip: Regularly review these recordings to extract key information, create how-to guides, and generate transcripts that can be used in other training materials or plugged into AI-driven tools for future reference.
- Encourage Self-Reliance in Knowledge Utilization:
  - Action: Shift the team's mindset from relying on direct answers to consulting the knowledge base or video tutorials first.
  - Implementation Tip: Provide consistent reminders and incentives for using documented resources. For example, create a "consult-first" policy where team members are encouraged to check the knowledge base before asking a colleague.



By working towards putting these steps into action, you can work towards a knowledge-sharing culture that leverages diverse instructional methods, fosters self-reliance, and ensures that knowledge is effectively utilized across your organization. This approach not only enhances individual skills but also builds a more collaborative and empowered workforce.



In the next chapter, we will explore how to develop skills around the knowledge created and ensure that our team can effectively utilize and build upon this knowledge.

## CHAPTER SEVEN

# The Learning Lab

A quick look back to summarize where we are and how we got here: we've successfully shifted momentum towards a culture of knowledge sharing within our team. We now have comprehensive knowledge bases where new learnings are documented, reducing dependency on siloed knowledge. We have multiple modalities for capturing and sharing knowledge. However, we encountered a new challenge: instead of using the knowledge bases and documentation, the team continued relying on the old-way...asking someone for help. This problem was compounded by the team being hesitant to apply documented knowledge to situations that deviated even slightly from what was documented. This hesitation and lack of commitment highlighted a crucial gap—we had created well-worn pathways of doing things but not a solid foundation of understanding nor the competence to adjust issues that slightly deviated.

In universities, students in subjects like biology, chemistry, and even mathematics often attend labs in addition to lectures. These labs allow students to dissect concepts, test their understanding, and practice solving problems in a hands-on environment. Inspired by this model, we realized that Wholestack Solutions also needed a lab—a space where our team could experiment, test new understandings, and apply knowledge from our knowledge bases in practical, varied scenarios.

We invested significantly in our lab, equipping it with physical equipment and virtual devices. The lab was designed to be a space where team members could experiment with solving tricky situations and learn new skills. We were excited to provide this resource and shared its availability with the team, encouraging them to use it for practice and experimentation.

We stood the lab up –stepped aside and everyone rushed to the resource!

No. Sadly, that is not at all what happened. In fact, to our surprise and disappointment, the response was minimal. Few team members utilized the lab to its full potential. This underutilization wasn't due to the lab's lack of resources or opportunities, but rather because the team did not have a strong enough foundational understanding to know how to effectively use the lab for testing new skills. Another gap uncovered.

Using the analogy of a university chemistry lab: if a teaching assistant (TA) simply provided all the chemicals and equipment without guidance, students would not know where to start. As a student of chemistry, how would you know what experiment to run? What was safe and not safe? What you were trying to test for a better understanding. As a student, you would not have the foundational knowledge to conduct meaningful experiments or understand the expected outcomes. Similarly, our team needed more foundational knowledge and structured guidance to make effective use of the lab.

We recognized that simply having a lab was not enough; we needed to provide more structured learning and guidance to build a solid foundation for our team. This included:

- **Structured Learning Modules:** Introducing detailed, step-by-step modules to help team members build foundational knowledge before experimenting in the lab.
- **Guided Lab Sessions:** Organizing guided sessions where experienced team members or mentors could walk through complex problems and demonstrate how to experiment and solve them.
- **Practice Problems and Scenarios:** Providing specific problems and scenarios for team members to tackle in the lab, giving them clear objectives and expected outcomes to aim for.
- **Feedback Mechanisms:** Implementing a system for providing feedback on lab work, helping team members understand what they did well and where they could improve.

It lead us to another component within our Empowered Workforce System – The SimGym (a concept we'll discuss in the next chapter), or the Simulation Gym!

The creation of our learning lab was a critical step towards fostering a deeper understanding and practical application of knowledge. However, its initial underutilization highlighted the need for a more structured approach to learning. By providing foundational knowledge, guided practice, and clear objectives, we can ensure that our team is well-equipped to leverage the lab effectively, meaning they could now marry the documented knowledge to a safe practice space and combine those into applicable skills.

Here are some actionable steps for your organization to try for an effective use of learning labs and building foundational organizational knowledge:

- **Develop Structured Learning Modules:**
  - **Action:** Create step-by-step learning modules that provide foundational knowledge before team members begin experimenting in the lab.
  - **Implementation Tip:** Design these modules to cover both basic concepts and more advanced topics, ensuring that team members have a solid understanding before tackling complex problems.
  
- **Organize Guided Lab Sessions:**
  - **Action:** Implement regular guided sessions where experienced team members or mentors walk through complex problems and demonstrate effective problem-solving techniques.
  - **Implementation Tip:** Schedule these sessions at different times to accommodate various team members' availability and learning styles, ensuring broad participation.

- Provide Specific Practice Problems and Scenarios:
  - Action: Offer a range of practice problems and scenarios in the lab that mirror real-world challenges, with clear objectives and expected outcomes.
  - Implementation Tip: Rotate these scenarios periodically to keep the practice relevant and challenging, helping team members develop a deeper understanding of how to apply their knowledge in diverse situations.
- Implement Feedback Mechanisms:
  - Action: Establish a system for providing constructive feedback on lab work, helping team members understand their strengths and areas for improvement.
  - Implementation Tip: Use a combination of automated feedback (e.g., instant feedback on quizzes) and personalized feedback from mentors to create a balanced approach that supports continuous learning.
- Encourage Lab Utilization:
  - Action: Actively encourage team members to use the lab as a resource for experimentation and skill development, emphasizing its value in applying documented knowledge to practical scenarios.
  - Implementation Tip: Incorporate lab utilization into performance reviews or development plans, recognizing and rewarding those who make effective use of the resource.
- Integrate Learning with Practice:
  - Action: Ensure that the documented knowledge from your knowledge bases is seamlessly integrated with lab activities, allowing team members to immediately apply what they've learned in a hands-on environment.
  - Implementation Tip: Create cross-references between knowledge base articles and relevant lab exercises, making it easy for team members to transition from learning to practice.

- Monitor and Adapt Lab Resources:
  - Action: Regularly review how the lab is being used and make adjustments based on team feedback and performance outcomes.
  - Implementation Tip: Collect data on lab usage, participation in guided sessions, and feedback from participants to continually improve the lab experience and ensure it meets the team's needs.

By taking these steps, you can bridge the gap between documented knowledge and practical application, ensuring that your team is well-prepared to tackle real-world challenges. This approach will help your organization build a more resilient and self-reliant workforce, capable of adapting to new situations with confidence.

In the next chapter, we will delve into the SimGym that we created, how it addressed our needs around up-skilling and re-skilling and how it helped us turn employees into resilient, self-reliant resources!



## CHAPTER EIGHT

# Working Out In The SimGym

In our journey so far, we have explored the development of knowledge bases, the creation of learning labs, and the cultural shift towards documentation and knowledge sharing. Despite these advances, we encountered a critical distinction: knowing a concept and applying that concept are two very different skills. This chapter delves into our solution to this challenge—the SimGym, a robust simulation environment designed to bridge the gap between knowledge and practical application.

While our knowledge bases were becoming comprehensive, filled with how-to guides and standard operating procedures, we faced yet another hurdle. Our team struggled to apply these concepts to real-world problems unless the documentation perfectly matched the situation at hand. This created a "paint by numbers" approach, effective only when scenarios followed the script exactly. However, the world is inherently messy, filled with exceptions and non-standard situations. Our team froze when faced with exceptions.

To address this, we needed a way to teach our team to navigate these gray areas, applying knowledge contextually rather than rigidly following scripts. The learning lab helped, but it did not fully bridge the skills gap. We realized we needed a more dynamic and practical environment where our team could practice their skills in nuanced scenarios.

This realization led to the creation of the SimGym. As of this eBook, our SimGym boasts over 300 simulations in our library—each one representing real situations we have encountered as a company. These simulations provide a laboratory-like experience where team members can practice their skills, applying the concepts learned from our knowledge bases to contextually nuanced situations in a safe, controlled environment.

Let's walk through how it works. First, a simulated ticket is created. Team members are assigned these simulated tickets – no different than a standard ticket they may encounter during the day. They then log into a simulated customer environment to resolve the stated issues. This hands-on approach allows them to practice their skills in a realistic setting while using actual use-cases we have experienced. And often these use-cases are situations that tripped us up initially. We do not just learn from our mistakes once – we practice them over and over again so we only have to learn from real-world mistakes once.

From there, a senior resource keeps an eye on performance metrics and reviews those with the resource going through the simulation. Now team members can compare their performance against expected benchmarks, identifying areas for improvement.

But it is not just ones and zeros, we also employ feedback mechanisms to the “how” not simply the “what.” Upon completing a simulation, senior resources review the work, much like a personal trainer evaluates a client's form. This review is not limited to outcomes; it includes detailed analysis of the process, aided by screen recordings that capture the entire simulation. That's right, during simulations we are recording and capturing the work the learner is going through. This ‘game-day’ footage helps us create better simulations, better learning guides, better knowledge artifacts – and provide better feedback. Smashing the record button enables continuous feedback loops based on reality...not what we ‘think’ the learner did; but what they actually did.

So, is that it? The learner goes through the simulation and mission accomplished? Not quite. Once feedback is provided to the learner – the proctor may then ask the learner to repeat the simulation to reinforce their skills. This ongoing process ensures deep learning and mastery of new skills. What we are truly building is “muscle memory” within the skillsets we're training for. At two-in-the-morning, when the phone rings and a customer has an emergency...our resources need to be able to act and react...muscle memory is important during a crisis. Or when you are tired. Or distracted. Or just because. And so, we drill the skill. Time and time again.



The simulation work is not enough, however. We discovered feedback is a crucial component of the SimGym. Senior resources review the 'game footage' of simulations, pinpointing where learners deviated from standards or faced difficulties. This process mirrors athletic training, where continuous practice and expert feedback lead to skill refinement and improvement. The feedback loop not only enhances the learner's skills but also helps those who design the simulations to identify and address gaps in the training material. It also provides learners with positive and constructive guidance which is key in the learning process.

Our approach to simulations is not just about individual learning but also about improving our training materials. If a learner struggles, it may indicate that our documentation or simulations need refinement. This continuous improvement process benefits both the learners and the organization, ensuring that our training resources are always evolving and improving.

With the SimGym in place, we have made significant strides in bridging the gap between knowledge and practical application. However, our journey does not stop here. Next, we will explore the concept of formal learning journeys, a structured approach to further enhance our team's development and readiness.

Here are some actionable steps your organization could take to begin bridging the gap between knowledge and practical application:

- Create a Simulated Environment:
  - Action: Develop a robust simulation environment (like the SimGym) where team members can practice their skills in realistic, nuanced scenarios.
  - Implementation Tip: Start by identifying common challenges and exceptions your team faces, and create simulations that mirror these real-world situations. Use past incidents and tricky cases to build your simulation library.

- **Assign Simulated Tickets:**
  - **Action:** Regularly assign team members simulated tickets that replicate real-world tasks or issues they may encounter.
  - **Implementation Tip:** Ensure these simulations cover a wide range of scenarios, including the less common, more complex cases that require critical thinking and adaptation beyond standard procedures.
- **Monitor Performance and Provide Feedback:**
  - **Action:** Implement a system where senior team members monitor simulations and provide detailed feedback on performance.
  - **Implementation Tip:** Use screen recordings of the simulations to review the process and outcomes, giving constructive feedback on where the learner excelled and where improvements are needed.
- **Incorporate Continuous Feedback Loops:**
  - **Action:** Use the feedback from simulations to continuously refine your training materials, simulations, and knowledge bases.
  - **Implementation Tip:** Regularly review the effectiveness of your simulations and adjust them based on learner performance and feedback. Involve learners in this process by asking for their input on how the simulations can be improved.

By implementing these steps, you can bridge the gap between theoretical knowledge and practical application, ensuring that your team is well-prepared to tackle real-world challenges effectively. This approach not only enhances individual skill development but also strengthens the organization's overall capability to adapt and excel in complex situations.

As a quick summary – our SimGym represents a significant evolution in our training methodology, moving beyond theoretical knowledge to practical, hands-on learning. By providing a safe space for experimentation and iterative learning, we equip our team with the skills and confidence needed to tackle real-world challenges effectively.

## CHAPTER NINE

# Learning Journeys (LJs)

In previous chapters, we discussed the SimGym, learning labs, and how these tools have helped us pass along new skills and understanding to our team. However, we identified another gap in our system—one that could not be filled by documentation, videos, or simulations alone. This chapter addresses that gap with the introduction of Learning Journeys.

While documentation, videos, and simulations are valuable tools, they are tactics that require a guiding strategy to be truly effective. This strategy is what we call Learning Journeys. We realized that simply providing knowledge artifacts and simulations led to fragmented learning. Without a clear understanding of the purpose and path ahead, learners were left with isolated pieces of knowledge rather than a cohesive foundation.

In universities, students are given a syllabus on the first day of class, outlining what to expect and how the course will progress. Similarly, we needed to provide our learners with a structured roadmap—a formal learning journey that guides them from novice to practitioner.

A Learning Journey is designed by seasoned experts within a specific skillset. For example, if the journey focuses on Cisco's ISE product, an experienced ISE resource would craft the journey. They would identify what skills and knowledge are necessary for day-to-day tasks, and then create a structured path that includes documentation, learning materials, simulations, and reviews. The goal is to transition a learner from a beginner to a practitioner—not necessarily an expert, but someone equipped with the foundational skills to continue learning and adapting.

It is important to note that neither our Learning Journeys – nor our system of Empowerment – are about creating instant experts. Expertise is an ongoing pursuit, particularly in a world where technology and requirements change rapidly. True experts often consider themselves lifelong learners, continuously adapting to new information and challenges. Our Learning Journeys aim to build a learner’s comfort, confidence, and competence in a specific area, empowering them to navigate and demystify new situations with ease.

Learning Journeys also provide significant opportunities for those who design and teach them. Teachers learn alongside their students, refining their ability to convey concepts, develop effective learning materials, and ensure their students are becoming more competent. This feedback loop is integral to our process of continuous improvement. By reviewing and adjusting the content we create in-house, we tailor our Learning Journeys to our specific context and close any gaps in understanding.

Learning Journeys have been a critical piece in realizing the full potential of our Empowerment System. They allow us to demystify complex concepts and share them with a broader audience, both within our organization and with our customers. As we continue to expand our capabilities, we see further opportunities to enhance these journeys through the use of advanced technologies like large-language models (e.g., ChatGPT) and retrieval-augmented generation (RAG), which can provide contextual answers based on our existing knowledge.

Our core components—documentation, knowledge bases, the lab, the SimGym, and Learning Journeys—form a comprehensive system that can be applied to help our customers unleash their potential. These tools are not just for internal use; they are valuable resources that we can share with our clients to support their growth and development.

You too can begin to think about how to create more formal and structured learning for your teams. Some tips we've learned: smash the record button and talk out loud about what you think is needed for someone to learn the process, tool or subject you're wanting to pass along. Use AI and chatbots to review the transcript and help you begin crafting an outline of what that learning structure may look like. Make sure you are incorporating opportunities to practice what the learner has reviewed – and set aside time to have dialogue with the learner to ensure they are understanding how to extract the context of the content. In other words – can they apply high-level learning to their day-to-day job?

Here are some actionable steps your organization can take to being creating and implementing learning journeys

- Design Structured Learning Journeys:
  - Action: Create formal learning journeys that guide team members from novice to practitioner in specific skill sets. Implementation Tip: Start by identifying the key skills and knowledge necessary for day-to-day tasks within a particular domain. Work with experienced team members to map out a learning path that includes documentation, simulations, and assessments.
  - Implementation Tip: Start by identifying the key skills and knowledge necessary for day-to-day tasks within a particular domain. Work with experienced team members to map out a learning path that includes documentation, simulations, and assessments.
- Develop a Roadmap for Learners:
  - Action: Provide learners with a structured roadmap or syllabus that outlines what they can expect to learn, the order of topics, and the resources available to them.
  - Implementation Tip: Use a visual timeline or learning path to help learners understand how different modules connect and build on each other. Make this roadmap easily accessible, such as in your knowledge base or learning management system.

- Incorporate Hands-On Practice and Review:
  - Action: Ensure that each learning journey includes opportunities for hands-on practice, followed by reviews and feedback sessions.
  - Implementation Tip: Integrate simulations, labs, or real-world projects where learners can apply their knowledge. Schedule regular check-ins with mentors or senior team members to discuss progress and address any gaps in understanding.
- Create a Continuous Feedback Loop:
  - Action: Implement a system where both learners and instructors can provide feedback on the learning journey and make adjustments as needed.
  - Implementation Tip: Regularly review learning materials and outcomes with the team. Use the feedback to refine the journey, update content, and ensure it remains relevant and effective.

By implementing these steps, you can create structured and effective learning journeys that empower your team to apply their knowledge in practical, meaningful ways. This approach not only enhances individual growth but also strengthens the overall capability and cohesion of your organization.

In the next chapter, we'll wrap up our process by introducing a final crucial element that we eluded to: jam sessions. These collaborative gatherings play a key role in fostering innovation, knowledge sharing, and team cohesion. Stay tuned as we explore how jam sessions contribute to our culture of continuous improvement and empowerment.

## CHAPTER TEN

# Jam Sessions

In our previous chapters, we explored the use of learning labs and simulations, inspired by university models, to enhance our team's skills and understanding. Now, we're turning to another university model—the seminar—to introduce the final component of our Empowerment System: Jam Sessions.

Seminars are often small, discussion-based courses where students engage with current learning materials through conversation, building on their prior readings and assignments. In a previous chapter, we mentioned that it is important for learners to talk 'out loud' about the concepts they are learning.

They need to learn how to put the learnings into their own words to display true understanding. It is yet another feedback loop – it is an opportunity to identify where concepts can be explained better, practice materials re-arranged in a way to push learners towards understanding. We cannot allow learners to suffer in silence and jam sessions force conversations that may indicate where confusion exists.

It is crucial to distinguish between memorization and true understanding. Memorization, like learning multiplication tables by rote, does not necessarily mean a learner grasps the underlying principles. In the same way, we do not want our learners or customers to simply memorize best practices or repeat what they observed. Instead, jam sessions are designed to challenge them to wrestle with ideas and concepts, to struggle a bit as they put those ideas into their own words. This struggle is where true understanding and demonstration of learning occur.

One of the key practices in our jam sessions is recording these discussions. These recordings are treasure troves of content that can be mined later. If a concept is identified as unclear during a session, we can pull the transcript and use it to refine our learning journeys or augment our documentation. Jam sessions, in this sense, act as the connective tissue linking our knowledge bases, labs, simulations, and learning journeys. They are a forum for providing and receiving feedback, adjusting expectations, and course-correcting as needed.

Jam sessions also serve as crucial check-in points to ensure we are staying on course. Let's ask this – if you are flying a plane and you are 1 Degree Off Course, is it a Big Deal? The answer is wholly dependent on the distance flown. Over the course of a one-hundred-mile flight, being one degree off course likely does not make significant difference. However, over the course of a one-thousand-mile flight? You are in an entirely different city than you intended.

This concept highlights how small deviations can lead to significant misdirection over time. Jam sessions help us detect these small deviations early, so we can make the necessary adjustments before we stray too far off-course. This process is an essential part of our co-piloting approach and our broader Empowerment Services.

A key insight we have gained is that knowledge and content are not limited to formal documents or videos. Conversations themselves can be valuable knowledge. By recording jam sessions, we capture thoughts and ideas that might otherwise be lost, giving us the opportunity to revisit, learn from, and repurpose these discussions. This approach broadens our understanding of what constitutes valuable content and emphasizes the importance of capturing every piece of the learning process.

Jam sessions, much like university seminars, are a vital part of our Empowerment & Demystification System. They help us move our customers and team members towards greater confidence and competence, ultimately helping them unleash their potential. These sessions are not just about reviewing what we know but about challenging and expanding that knowledge in a collaborative and supportive environment.



As we wrap up our exploration of our Empowerment & Demystification System, it is clear that jam sessions play a crucial role in connecting all the elements we have discussed—knowledge bases, labs, simulations, and learning journeys. They provide a space for reflection, feedback, and continuous improvement, ensuring that our team and our customers are always moving forward.

Here are some actionable steps your organization can take to begin implementing jam sessions as part your team empowerment:

- Incorporate Regular Jam Sessions:
  - Action: Schedule regular jam sessions that encourage team members to discuss and reflect on the concepts they are learning.
  - Implementation Tip: Structure these sessions similarly to university seminars, where small groups engage in in-depth discussions. Ensure each participant has the opportunity to speak and share their understanding.
- Encourage 'Out Loud' Thinking:
  - Action: Promote the practice of discussing concepts out loud during jam sessions to help team members articulate their understanding.
  - Implementation Tip: Pose open-ended questions that require learners to explain concepts in their own words. This can help identify gaps in understanding and areas where further clarification is needed.
- Record and Review Jam Sessions:
  - Action: Record all jam sessions to capture the insights and discussions that occur, making it easier to revisit and refine learning materials.
  - Implementation Tip: Use transcription tools to generate written records of these sessions, which can be reviewed and analyzed to enhance learning journeys and other training materials.

- Use Jam Sessions for Course Correction:
  - Action: Utilize jam sessions as check-in points to ensure the team is on track with their learning goals and understanding.
  - Implementation Tip: Periodically review the discussions to detect any small deviations from the intended learning path, and make adjustments as needed to keep everyone aligned with the objectives.
- Capture and Repurpose Valuable Content:
  - Action: Treat the conversations and insights from jam sessions as valuable knowledge that can be repurposed into other learning formats.
  - Implementation Tip: Create summaries, FAQs, or even new training modules based on the rich content generated during these discussions. Share these resources with the broader team to reinforce learning.
- Integrate Jam Sessions with Other Learning Tools:
  - Action: Connect jam sessions with your existing learning tools such as knowledge bases, labs, and simulations to create a cohesive learning ecosystem.
  - Implementation Tip: After each session, update relevant knowledge base articles or simulation scenarios with new insights, ensuring that the entire learning system evolves together.

By implementing these steps, you can integrate jam sessions into your learning and empowerment system, creating a dynamic environment where knowledge is not only shared but also expanded and refined through collaborative discussion. This approach will help your team members and customers build deeper understanding, greater confidence, and stronger competence in their respective roles.

In the next chapter, we'll bring together all these components and discuss how they collectively contribute to a comprehensive and effective approach to empowerment. Stay tuned as we continue to explore how to unlock potential and drive success.

## CHAPTER ELEVEN

# Summary and Final Thoughts

Let's take a moment to summarize what we've learned through this eBook. We started as 18out, a startup accelerator dedicated to helping founders learn alongside us. We then transitioned into Wholestack Solutions, an IT services firm with a mission to unleash potential. And finally, UnleashU – where we developed our Empowerment & Demystification System.

Throughout our journey, we encountered several challenges that shaped our path and these challenges are likely ones you face:

- **Siloed Knowledge:** Information was trapped within individuals, inaccessible to the broader team.
- **Lack of Documentation:** We struggled with insufficient documentation, which hindered knowledge sharing.
- **Lack of Discipline in Documentation Practice:** Even when documentation was created, maintaining it was inconsistent.
- **Knowledge Hoarding:** Team members often guarded their expertise, viewing it as their "secret sauce."
- **No Formalized Learning Opportunities:** There was no structured approach to learning and development.
- **No Practice Area:** Without a designated space for practice, skill application was limited

For years, we believed that solving the next immediate problem would finally put us in a position of success. But each solution revealed a new challenge. This decade-long journey of moving from problem to solution and back again has told us that the real solution is in creating a system that can manage that cycle. And that is ongoing work – the process of demystification and empowerment is not linear—it's a continuous cycle.

Here is what we learned on our journey – a system of empowerment and demystification must be built on an ongoing cycle of discovery, learning and sharing. We see the cycle as follows:

- **Uncover the Unknown:** We start by identifying something we do not know. Neither our team nor yours can be afraid of “I don’t know.” We welcome it and encourage it as it represents an opportunity.
- **Document It:** Once identified, we document the new knowledge. Seriously. Write it down – the greatest lie we tell ourselves is “I’ll remember.” From our ten years of painful lessons, trust us on this one. Write it down.
- **Distribute It:** We then share this documentation across the team. Knowledge is useless unless shared. If we are all truly on the same team, then everyone should have access to knowledge.
- **Create Simulations:** We build simulations to allow for practical application and testing. People need to practice. Just learning a new thing does not mean the person understands the new thing. Set aside time to let them practice.
- **Develop Learning Journeys:** Structured learning paths are created to ensure comprehensive understanding. These learning journeys are nothing more than a map. We’re at starting point A and want to get to point B.
- **Conduct Jam Sessions:** We discuss, review, and refine our understanding in collaborative sessions. Let the team talk it out. In our digital world, we have de-prioritized conversations. Talking about new learnings is one of the most powerful (and under-utilized) tools available to learners.

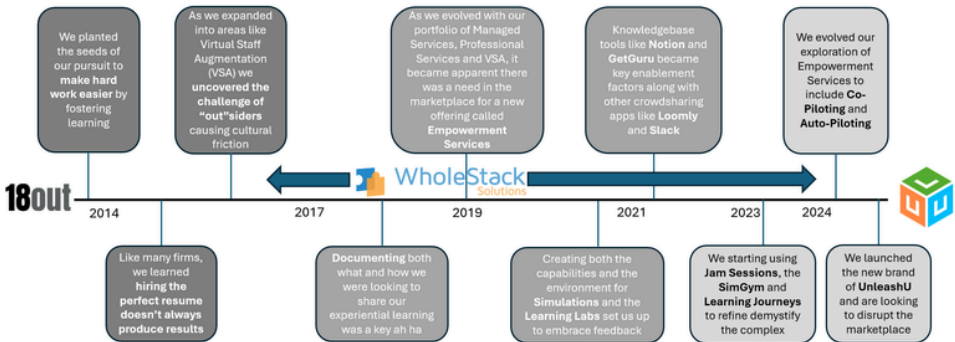
And then? The cycle repeats. As soon as we uncover something new, we start the process again. This evergreen approach to learning ensures that we’re always evolving, always improving, and always prepared for what may be next.

# Conclusion + Timeline

Our 10-year journey has taught us that learning is not a one-time event but an ongoing process. There will always be something unknown, something new to learn, and our system is designed to adapt to these challenges continuously.

We hope if you have seen similar challenges within your own organization that the action items included in this eBook help point you forward to a more resilient workforce, one that is equipped and empowered to address the changing needs of your market.

And if you need us, we are here to help. Our tagline is: Knowledge is Power, We Share Both.



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