Guru Governance Worksheet

1️⃣ Knowledge Structure: Determine who has access to what in Guru

Collection Hierarchy
- A Guru best practice is for each team to have their own Collection (or area) for their specific content.
- Org-wide teams typically have General and/or HR Collections that hold all company-wide information.

Discussion Questions:
- Which collections should all users have access to? Which collections should be hidden?
- How much freedom should individual teams have to determine their collection organization? (In terms of permissions, board structure)?

Current Collection Structure:

Collection	Author	Read Only

Future Collection Structure:

Collection	Author	Read Only

2️⃣ Card Creation: Who can create and verify knowledge in Guru? What are your team's baseline standards for content in Guru?

Discussion Questions:
- **Do you want to give everyone access to author *something*? Or is content creation limited to a certain group of SMEs?**
  - What are the downsides of allowing users to create content?
- **What does the verification flow look like?**
  - If so, consider the following options:
    - Should verification be set to individuals or groups?
    - E.g. - Entire "Sales" group can author Cards in the Sales Collection
    - Once those cards are created, they must set the verifier to "Sales Experts" for final approval
      - How would you get into the Experts group?
      - How would you disqualify as an Expert?
  - Will "expert" verifiers be overwhelmed? Will the extra step affect adoption and contribution?

Content Standards:
- Build out a list of baseline attributes that all new content must include.
  - This promotes consistency across the content in your instance
- Bake your content standards into **Templates** that the rest of your team must use when creating new content, so that maintaining quality is easy!

  Sample Content Standards:
  1. Every card created needs to sit on at least one board - no loose floating cards without a home. If an appropriate board does not exist - create one.
  2. Every card should have at least two tags - default to using existing tags before creating new tags.
  3. Every card should begin with a 2-3 sentence executive summary.
  4. Where appropriate, related cards should be cross-linked.
  5. Before drafting a card a search should be done to ensure two things:
     a. An existing card does not already exist
     b. The author has appropriate insight into cards that should be cross-linked
  6. Use a template if there is a relevant one available.

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7. Any included files should always be iFramed into the card. They shouldn't just be uploaded, they shouldn't be screenshots…they should be iFrames.
8. If you edit a card, ALWAYS ask for verification when you're done.

Card Lifecycle:
- Ensure that your knowledge remains fresh over time and that there are built out cadences to review your content.

Discussion Questions:
- **What is the longest reasonable time that a Card can go untrusted?**
- **When do you archive?**
  - X amount of months since the last view
  - X amount of months since the last edit
  - How often do you check for duplicates?
    - Who checks for duplicates?
- **API**
  - Would you want to automate these rules to auto-archive Cards?

Guru Management: Who is responsible for the upkeep and adoption of Guru?

Knowledge Council:
- Group of individuals who manage Guru across the org.

Discussion Questions:
- **Who is involved?**
  - People from each department?
  - Is everyone an admin?
- **Communication:**
  - How often will you meet?
  - Slack channel?
- **Holding each other accountable:**
  - Baseline Trust Score for each Collection = X%
  - What is the handoff process for those with a new role, parental leave, etc.?
- **What should go in the General Collection vs. departmental Collections?**
  - Who owns General Collection?
- **User Provisioning:**

- Does IT provisions users in Okta (or other SSO tool)?
  - Does IT deprovision users?
- Do SMEs for each department add/remove users for their team?
- Who is responsible for making sure new users are added to the appropriate Groups?
- What does training for new hires look like?
  - Lessonly only?