

CREATIVITY WITH BOUNDARIES



Operator Knowledge Retention

Field Capture → Trusted Knowledge → Guidance at the Point of Work

A practical, three-level approach to keeping hard-won operational know-how inside your business.

Most Knowledge Never Reaches a System

Where it lives today

In habits, exceptions, sounds, workarounds, and judgment built over years on the floor.

How it leaves

Retirement, turnover, or a rushed handoff, often with no warning and no record.

1

CAPTURE

What the operator sees, does, and decides

2

CURATE

Turn observations into trusted, approved knowledge

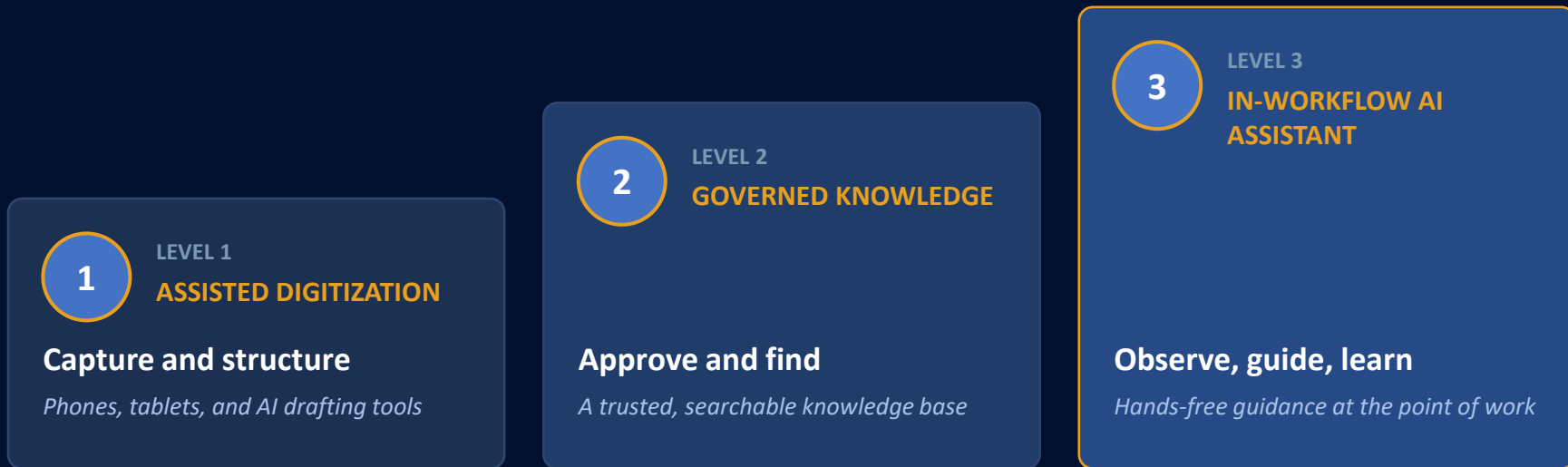
3

DELIVER

Return the right guidance during training or work

The goal: turn one expert's know-how into repeatable performance across the team.

Three Levels, One Path



Each level builds on the one below, and **all three depend on people** who trust the process.

Turn Field Capture into Procedures

1

CAPTURE

Notes, photos, voice, or video on a tablet or phone, even offline

2

SYNC

Upload when back online; AI transcribes the recording

3

DRAFT

AI tools such as Loom, Gemini, or Copilot turn it into written steps

4

VERIFY

The operator or expert corrects the draft before it's published

BEST FIT

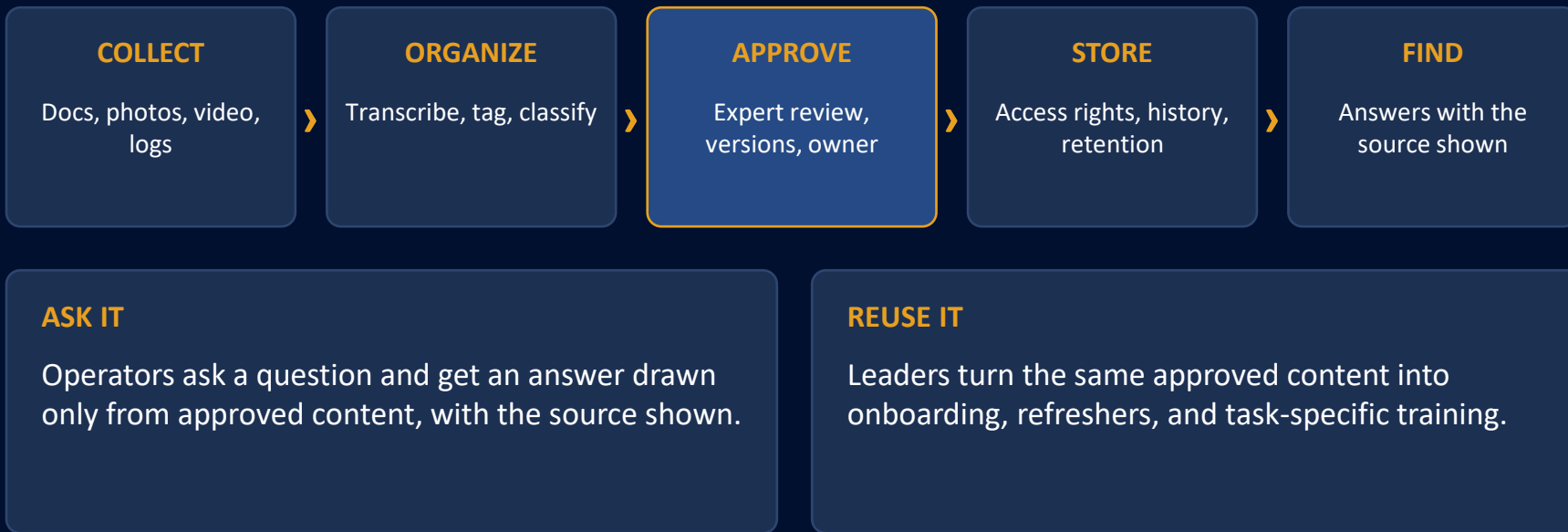
Early pilots, less frequent tasks, and experts nearing retirement

GUARDRAIL

Never publish an AI draft without a person reviewing and approving it

Why start here: low cost, fast results, and it captures knowledge while your experts are still here.

Make Knowledge Trusted and Reusable



The key step is approval: experts decide what becomes “the right way,” so people can trust what they find.

Guidance in the Flow of Work

THE OPERATOR SAYS

“The vibration changed after the setup. Here’s what I see.”

Voice + hands-free video + task status

Captured through smart glasses or a headset

THE ASSISTANT RESPONDS

1

RETRIEVE

Finds similar approved cases and the current procedure

2

GUIDE

Suggests checks, cautions, or a call to a remote expert

3

DOCUMENT

Records what was seen, what was done, and the result

The difference: approved knowledge guides the work, and new learning flows back after review.

Choose the Level by Risk and Readiness

LEVEL	BEST FIT	GUARDRAILS	EFFORT	PRIMARY VALUE
1 • Digitize	Specific tasks; experts nearing retirement	An operator or expert reviews every output	LOW	Fast capture into usable procedures
2 • Govern	Knowledge shared across teams	Approval, versions, owners, access rights	MEDIUM	Trusted answers and reusable training
3 • Assist	High-value, hands-busy work	Live context, expert escalation, and review	HIGH	Guidance and capture in the flow of work

Rule of thumb: add technology only when the use case, content quality, and review process are ready for it.

Actual effort varies with systems integration, security needs, and the scope of change.

Start Small, Then Build the Learning Loop

1

PILOT

Prove capture quality

Pick one critical task and one experienced operator. Measure completeness, usability, and review effort.



2

GOVERN

Build trust

Set owners, approval rules, versions, access, and a refresh schedule before opening it up widely.



3

SCALE

Embed and learn

Connect training, search, and hands-free guidance, and route new learning through review.

Let's talk: Which workflow is too valuable to lose, and ready to capture now?

Determine which level is right for your business.
Decide which workflow is too valuable to lose.
Follow our recommended approach...

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