

Chapter 16

It's in the Vault: A Case Study of Lessons Learned From Rebuilding Shopify's Company-Wide Wiki

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ABSTRACT

This chapter is a case study of the rebuild of Shopify's internal wiki (intranet) and describes the approach of updating the wiki and explores the elements that made the project a success. The problems with the existing tool are presented along with the strategies used to remedy these issues and rebuild the wiki. The project harnessed Shopify's culture of trust, accountability, and transparency to create a tool authentic to the needs of the company. At the heart of the project's approach is the people, process, and technology trifecta that the project team was built upon. This cross-functional team intersected change management, communications, knowledge management, and developers. Readers of this chapter will learn the approach and methodology of composing a project team based on this trifecta and how it led to the successful rebuild of Shopify's wiki. Although Shopify had the opportunity to build its tool internally, this chapter is not a showcase of the tool; the focus is on the approach and strategies of the project team, which can be applied to any intranet-like project.

INTRODUCTION

In May 2019, Shopify re-launched its internal wiki, seven years after the wiki was built in-house, as the company had outgrown the original features and functionality of the tool and its content had become disorganized and largely out-of-date. Shopify's employees had lost trust in the wiki and a project team was assembled to update the tool and organize its content. The rebuild of the wiki, called "the Vault," was constructed on five main pillars:

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It's in the Vault

1. Form a cross-functional team based on the people, process, and technology framework.
2. Integrate change management practices that engaged participation from employees across the company to enable trust in the tool to be regained.
3. Design an information architecture (IA) and plan a content migration strategy that ensured the updated wiki was organized in an intuitive structure with content that was relevant and up-to-date.
4. Promote the new wiki before and after its launch to keep all employees informed and involved in this change.
5. Integrate metrics throughout the project, from the early decision-making stage of the wiki rebuild to measuring engagement post-launch to determine the adoption and success of the new wiki.

Founded on these pillars, the strategy of the Vault's rebuild enabled the new wiki to connect Shopify's employees to the information they need, when they need it.

This chapter will outline how the knowledge management (KM) team and wiki project team at Shopify applied these five pillars to evaluate, rebuild, and launch an updated wiki experience that strengthened the company's knowledge sharing culture. Shopify's company culture will be explored in order to understand the unique beliefs, behaviours, and espoused values the project team had to consider to achieve an aligned and successful wiki update. The technical, cultural, and knowledge sharing issues of the outdated wiki and the strategy to address these issues will be examined. The chapter will explain the philosophy behind the structure of the project team and the critical role this structure played in a successful rebuild and launch. The project team's approach to change management, information architecture, communications, metrics and content maintenance are explored and connected to the enhancement of a knowledge sharing culture at Shopify.

REBUILDING AND LAUNCHING SHOPIFY'S INTERNAL WIKI

Organizational Background

Shopify is the leading cloud-based multichannel commerce platform for businesses to design, set up, and manage their stores across multiple sales channels. This includes web, mobile, social media, marketplaces, and brick-and-mortar locations. The Shopify platform provides merchants with a powerful back-office and a single view of their business. As of early 2021, Shopify powers over a million businesses in approximately 175 countries (Shopify, 2021a). Internally, Shopify is a product-first company with a commitment to maintaining and practicing company values, which contributes to its unique culture of trust, accountability, and transparency. Shopify has codified espoused values, which are integrated into all aspects of company work to ensure they are enacted and embraced by employees (Shopify, 2021b). These values are reviewed on a regular cadence to ensure they are authentic to the company and fit the current environment. Through this process, Shopify attempts to ensure that espoused and enacted values are in concordance.

Shopify has a tech culture that is powered by a trust battery. The philosophy behind the trust battery is that Shopify trusts its employees and believes everyone is capable of making their own decisions. The company fosters a culture where employees are empowered to conduct their work in an environment that allows them to champion initiatives, make decisions, and fail forward if a project does not produce the expected result (Bryant, 2016). Internally, the company defaults to open, this concept of open by default

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