

What You Need to Know About Knowledge Transfer

A White Paper by Steve Trautman

Knowledge transfer means reproducing the expertise, wisdom, and skills of critical professionals in the heads and hands of their coworkers. Although knowledge transfer is often associated with on-the-job training and mentoring, it means more than that. Simply put, it moves the right skills at the right time to keep a workforce prepared, productive, innovative, and competitive.

Common Misconceptions about Knowledge Transfer

"We're different—our knowledge is too complex, specialized, instinctive, political, situational, tactile [add your favorite adjective here] to be transferred."

Any expert's knowledge and wisdom, from any line of work, can be packaged and measurably transferred, so long as the apprentice has the capacity to learn it.

"We're just too busy. Our experts can't take time out for a 'formal' or concentrated knowledge transfer effort."

The process is quicker than you think. And, if replicating your experts' skills to reduce risk is deemed a critical priority, then you have to prioritize and efficiently weave this work into the tasks your experts already undertake.

"Our experts are not even located in the same country as their coworkers. Knowledge transfer from a distance is too hard. We have to put people on planes to get anything done, and that's expensive."

Proximity helps but is not necessary for knowledge transfer. A clear framework for the knowledge transfer process usually mitigates distance problems.

"Our experts don't want to teach."

This is almost never true; they just need better direction and tools.

"Knowledge transfer feels like just another 'flavor of the month' corporate initiative and there are too many of those already."

With talent shortages already hitting over 50% of America's workforce, demographic data indicate that the need for knowledge transfer will remain of strategic importance for decades to come, and it should warrant consideration at the top of your priority list.

"Knowledge transfer is really an aging worker problem and our team has plenty of younger employees."

An employee can leave at any time, so it's a myth that having younger workers reduces your risk. The real risk is employees with unique knowledge heading out the door.

"We already have knowledge transfer covered."

Rarely true. What's more likely—for the few organizations actually tackling this program—is that you have an existing knowledge transfer program that is not being measured, which means you don't really know if you've got it covered.

What a Good Knowledge Transfer Program Looks Like

A good knowledge transfer program should be simple.

If a plan requires a degree in psychology just to understand, it's too complex and will likely fall apart during implementation. Your program should be clear enough that non-HR executives can understand it quickly and without much effort. When line leaders implement it, they should start seeing results within days and be able to maintain the process in a few hours per month.

A good knowledge transfer program should include a methodology and tool set, with clear outputs that anyone can read and understand within a few minutes.

A good plan should give you a model for methodical transfer, tools to assess knowledge gap risks and set priorities, a plan and tools for transferring the knowledge in the most efficient way possible, and tools and metrics for proof of transfer. Ask: "How can I confidently measure that knowledge has been transferred?"

A good knowledge transfer program should drive a clear conversation about what knowledge needs to be transferred, who is to deliver it, and who is to receive it.

In many cases, managers avoid designating an "expert," someone capable of and tasked with delivering unique knowledge, unless required to do so. And, since everyone is so busy, assigning "apprentices," or people to receive the knowledge, can also be difficult. Poor knowledge transfer models are too general. Every good model must include a clear and prioritized list of the knowledge needed, who knows it, and who needs it. There is no way to predictably reduce risk without clearly defined roles and measurable outcomes.

A good knowledge transfer program should not be dependent on the degree of social or communication skills possessed by the person holding the knowledge.

If someone in your knowledge transfer program has to be a natural teacher in order to make the process work, it's an insufficient model. You will only end up transferring about 10% - 30% of the critical knowledge you must move. A good knowledge process needs to work independently of such personality traits.

Good knowledge transfer programs should foster a culture of knowledge transfer within the organization.

The goal is to make knowledge transfer happen organically at your company every day. A good knowledge transfer program will incorporate your efforts into existing long-term systems. It will show how to make knowledge transfer happen and include structures, terminology, roles, and systems of measurement and reward that turn transferring knowledge into a cultural norm.

A good knowledge transfer program should work well over time.

Your program needs to show how the risk is being reduced to maintain a ready, productive workforce today and down the road. Any good program also needs to be an on-going solution that can adapt to future conditions. The need to preserve your knowledge is not going away—it will exist into the future when new generations bring challenges that you cannot predict today. Don't settle for a "one-shot" knowledge transfer model that fixes only today's problem. Your plan needs to be customizable and reusable for future employees.

For more information on the upcoming Knowledge Transfer workshop, or Steve Trautman, please call Executive Forum at 503.635.3079.