



# café Conversations

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**The Essentials of Knowledge  
Transfer**

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# The Essentials of Knowledge Transfer

*“Successful knowledge transfer involves neither computers nor documents but rather interactions between people.”*

— T.H. Davenport, *CIO Magazine*



Organizations face a double threat: The lost knowledge of mature workers walking out the door, and the lost opportunity of engaging the newest employees. This trend is influenced by a slow-growing population of workers coupled with an aging workforce, unpredictable turnover among mid- and late career employees, and competitive recruiting for new employees with scarce skill sets.

One solution to eliminate the threat is knowledge transfer, also known as knowledge continuity management. Knowledge transfer focuses on passing critical knowledge from exiting employees to their replacements.

## Types of Knowledge

Knowledge is both “know-how” and “know-why.” There are two types of knowledge that your employees should pass on: 1) explicit knowledge, which is easily codified and conveyed to others; and 2) implicit or tacit knowledge, which is experiential, such as hunches, instinct and personal insight. Job profiles or descriptions and written procedures are a good way to share explicit knowledge. The problem is that most people jump into a new job, then read the procedures when they want

to find an answer to a specific question.

All of your company’s knowledge is important. What you have to figure out is, what knowledge is required for your organization to continue into the future? To answer this question, consider the following: your corporate direction and business success drivers; industry trends; current and future core competence; scarcity; and replacement costs.

Experts don’t always know what they know, and organizations certainly don’t know what knowledge they should try to transfer. Often this is where a trained third-party facilitator can help by acting as a bridge between the two parties. A facilitator can determine the methods best suited to the needs of an organization, and create a climate that’s conducive to knowledge transfer; a climate where employees are comfortable talking about what they know and what they don’t know. Example: experts often don’t follow the rules. An engineer in a power plant is supposed to follow the procedures manual, but he doesn’t always do so. He might break the rules in order to do a good job, but he’s reluctant to admit this. In a good climate, it’s OK to talk about these things.

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*This article has been adapted from The Essentials of Knowledge Transfer tool kit, developed by The Learning Café.*

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## Knowledge Transfer Methods

There are many ways to transfer both explicit and implicit knowledge. It's up to each individual organization to choose the methods that suit their needs, capabilities and company culture. Following are 26 methods that can be combined as you see fit:

**Case studies** — A facilitator interviews the experts and writes up a case study that poses questions about what it takes to go from good to great work in a specific job. This is especially useful when it targets something that's the exception to a rule. Example: ask engineers at a power company, "What do you do when the power grid goes down?" The answer may be more detailed, or just plain different, than what's written in the procedures manual.

**Communities of Practice (COPs) or Worknets** — COPs are typically groups that may not work together, but have the same body of knowledge. Example: although Xerox Tech Reps have the same job, they never see each other. Each works alone in the field servicing equipment for regional customers, but they've created a COP. On their own, the reps have set up a database of problems and solutions to help each other, and often arrange to meet informally when possible to talk about work. COPs usually exist

underground, and too much intervention from the employer can interfere. So if you discover a COP within your company — like the employees who gather outside during smoke breaks — support it but don't smother it.

**Demonstrations** — used for highly technical knowledge, or around more subtle human interactions. Example: a customer service representative may demonstrate the exact tone of voice they use when successfully calming down an angry caller.

**Designated Experts** — identify your top managers or employees with the most explicit and implicit knowledge, and appoint them as experts. Encourage them to share their knowledge, and encourage others in the same job or department to turn to them for advice.

**Documentation** — refers to creating checklists, forms, job aids and tools. This is a method that every organization can and should include in knowledge transfer.

**Documenting Improvisation** — in any work group, people improvise tricks of the trade — the "unconscious competence" they use to make things work smoothly. These are seldom written down or shared. Ask people to document the "better practices" they've been improvising so that others can use them.

**Education and Training** — share knowledge in a formal

training session. Your designated experts can teach classes, or provide the information for a trainer to impart.

**Find-the-Expert Yellow Pages** — list out the people with the answers to every question you can come up with, distribute the list and encourage all employees to turn to your yellow pages for information.

**Hands-on Brown Bags** — gather a department or group of people together over a brown-bag lunch to listen to a designated expert. Include a question-and-answer session or dialogue.

**Interviews** — have a facilitator or skilled employee conduct a journalist-style interview with each expert on your staff. Record the interview and make it available to others.

**Job Historians** — this is ideal for a retiree or new employee with special training. Have them interview each long-time employee/expert, and create a time line of that person's employment at the company, as well as a time line of how they typically spend their time on the job.

**Job Shadowing** — assign a newer employee to follow an expert around and learn how they work. The length of time spent on this will vary depending on the job, but it should be at least 90 days.

**Knowledge Networks** — basically a just-in-time network

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made up of your experts, which can be implemented as an email distribution list.

**Knowledge Profiles** — this rigorous process is used quite a bit. It entails writing a profile of everything an expert knows—typically technical or detail-oriented. The profile is often put online where other people in similar jobs can access it.

**Legacy Development Plans** — a facilitator asks employees to share what they know, and asks them what should be shared. This method shifts the emphasis to contribution. This can be included in annual performance appraisals, by asking each employee to write up or update what they know when they prepare for each appraisal.

**Lessons Learned** — there are several means of sharing lessons learned. They can be written down, or you can schedule a “woe was me” forum for employees to get together and talk about disasters and how they were handled. This demonstrates what can go wrong as well as what can be done, and can instill confidence in others that they can handle problems. You can also host a “lessons of experience” discussion where managers transfer wisdom to newer managers.

**Master Forums** — ask one of your experts to speak on a topic and make the presentation available to everyone in your company. NASA does this.

**Master-Apprentice Programs** — a mentoring style typically used in bargaining units or unions that employ skill tests for employees who wish to become “masters” of their trade.

**Mentoring (one-on-one)** — mentoring holds some differences when it relates to knowledge transfer. Mentors and their partners should self-select each other, and be given structure and tools to support them.

Many mentors find that the first phase of the learning is all about explicit knowledge. Then, after four or five months, an interesting shift happens, and mentoring focuses more on “how I do it” rather than “what I do.”

Also, mentors should be guided in different teaching styles, since many work based on their own learning style. There are three learning styles: action learning, where you pick up skills on the job; people learning, where you watch someone else at work; and information learning, where you read a manual or how-to book. If your mentoring partner has a different learning style than you, there could be trouble. Mentors need to learn how to adapt their style.

**Mentoring (group)** — makes use of a scarce mentor set. Match a senior mentor up with a small group to spread out your resources. This can help the members of the group become their own Community of Practice.

**Personal Web Sites** — used by Microsoft, this method has everyone set up a personal page or site on the company intranet to share their knowledge. You may set up guidelines for the sites, such as requiring an FAQ format, or an interactive forum for answering questions. (Remember, technology enables knowledge transfer — it doesn’t answer it.)

**Shared Diaries** — people write up a job history in real-time online. Others can see what’s happening in other departments (or their own), and may build a Community of Practice.

**Storytelling** — a facilitator can teach people in your organization how to tell stories — because stories leave more of an imprint than other communications. Basically oral history storytelling also conveys the values of your organization, and reveals who the heroes and villains are, what the culture is, how people are rewarded, and how people work. You can schedule weekly storytelling sessions, make storytelling part of your annual meeting, or simply train employees and let them practice around the coffee pot or in the hallways. Consider too, that employees tell stories outside the office — what are your workers telling their families and friends, and how does that affect your company?

**Talk/Chat Rooms** — make online communities available

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to employees so they can share knowledge, answer each other's questions and give advice.

**Traveling Masters** — this is very useful when you have only a few experts in a given role. Have them travel around to various offices or departments and give presentations on their unique knowledge. Like group mentoring, this is a good method if you have scarce expert resources.

**“Tribal Elder” Campfires** — a lot like storytelling, this method is built on a respect or reverence for someone in your organization who's done something exceptional. Tribal elders are those who embody the values of an organization, and having them host a “campfire” provides a terrific place for powerful conversations and dialogue.

## Choosing the Methods Right for You

The methods you use for knowledge transfer depend on several factors including: the life cycle of the knowledge and types of knowledge that need to be shared; the timeframe before valued experts will leave your organization; the experts' level of motivation and capability for sharing knowledge; and your employees' teaching and learning styles.

In order to succeed at knowledge transfer, you must understand the culture and environment within your company and work with what you've got. You

must also have confidence that your employees want to do a good job, and let them do it. If you notice your marketing team having a wind-up toy race, don't assume there is no learning taking place. There is also the fact that all learning doesn't come from employee handbooks or training sessions.

One way to gauge your environment for learning exchange is to look at the physical layout of your workspace. Do you have areas where people can exchange ideas and information? Are your hallways wide enough to accommodate conversation? If you see a gathering place, whether it's the lunchroom or an empty corner, consider posting a whiteboard or flip chart there and see what happens. You can't mandate knowledge transfer, but there are many things you can do to enable it.

## Warning Labels

When you undertake a knowledge transfer method or methods, be careful about the message you send to your employees. If you choose to focus on a specific department or management level, others may interpret that their knowledge isn't as important to the organization. Also, you're betting that you know the right knowledge to concentrate on—but unforeseen changes in the future could prove you wrong. We recommend that you make knowledge transfer tools available to

everyone in your company who wants them. It's fairly easy to extend your knowledge transfer program to include a toolkit for any employee or manager who requests it.

When you introduce knowledge transfer to employees, invite them to participate, and acknowledge each individual and their history and skills. Include them in the process or they may feel used. Many might also fear that you're asking for their knowledge because they're going to lose their jobs. So be careful to stress their value and the fact that all employees will act as givers and receivers of knowledge.

This article has covered the basics of knowledge transfer—the groundwork, benefits, methods, and caveats for beginning the process of creating a legacy of information, experience and knowledge within your organization. Take a look at your employees, your company and the knowledge you need to succeed as an organization. What can you do to ensure that all employees, current and future, have the explicit and implicit knowledge needed to do the best job possible? ✨