



Knoco Newsletter

December 2015 Knowledge Retention and transfer



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Other News

KM Starter Offers

We have introduced a range of low-investment starter offers, for companies wishing to get started in KM.

These include quick and easy ways to

[Assess KM in your organisation](#)

[Build a KM Strategy](#)

The Silver Tsunami, the Demographic Clif, the Great Crew Change, the onset of Corporate Alzheimers - describe it how you will, the anticipated loss of knowledge as experienced staff retire represents a massive business risk to many organisations.

This knowledge needs not only to be retained by the organisation, but also transferred to the employees that remain, and who will need to continue the work. If this does not happen, the organisation will lose competence, and suffer the risk of increased mistakes, increased costs, and lost customers.

This newsletter looks at the issue of Knowledge Retention and Transfer (KRT), and discusses how this issue may be addressed both strategically and tactically.

The KRT problem

[Scan knowledge topics, to find those most in need of attention](#)

[Gain engagement through a workshop](#)

[Understand your org. learning culture](#)

[Create a KM "proof of concept"](#)

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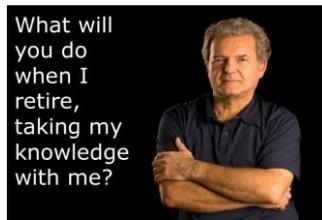
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Many Western Engineering, Manufacturing and Utilities companies face an imminent crisis. This is highlighted below in a study from a utility company.

- The average US utility worker is 44 years old, and the average US craft worker is 50. (Average U.S. worker is 37.).
- Within 4 years, as many as 60 percent of today's experienced workers will retire
- The shrinking labour force leads to an increased competition for talent
- 80% utility HR Executives identified the ageing work force as their biggest worry.
- Less than 50% have a strategy to deal with it.

The figures are typical. It is estimated that more than 25 per cent of the American working population will retire in the next five years, while in the United Kingdom, people belonging to the 45 to 59 years old range will soon constitute the majority of the active workforce. Highly strategic and knowledge intensive jobs are mostly filled by Baby Boomers who will be heading for retirement in the near future.

[Nick's blog](#)
[Rupert's blog](#)
[Vedalis blog](#) in French
[Ewa's blog](#) in Polish
[Knoco on YouTube](#)
[Knoco Chile](#)
[blog/newsletter](#)

If nothing is done, the knowledge they hold in their heads will leave with them, and the capability of the organisation will slip away. Industry is racing towards a demographic cliff-edge, and Knowledge Management will provide the only parachute.

Taking a strategic view of KRT



A [Knowledge Retention and Transfer strategy](#) takes a business-focused look at the risk and the urgency, prioritises topics and individuals for retention activities, and puts in place a planned and monitored approach to retaining and transferring the knowledge to new and younger staff.

The scope of your strategy should cover all of the jobs and all of the functions within the business where there is significant risk of knowledge loss; in other words where the workforce are approaching retirement age. A key stage in preparing a Knowledge Retention Strategy is to map out the scale and urgency of the problem. This [knowledge scan](#) can take place in one of two dimensions, as follows;

- A scan of the knowledge topics, characterising them by attributes

such as criticality, the level of documentation, the level of spread within the organisation, and the risk of loss; or

- A scan of the individuals, characterising them by the knowledge they hold, and the imminence of their departure.

The result of the scan will be a map of the organisational knowledge, identifying those areas where the risk of loss is highest, the consequence of that risk is greatest, and the need to act is most urgent. This allows prioritisation of areas which represent the critical knowledge areas within the strategy, which will prioritise our efforts in the short term.

[Contact Knoco](#) for help developing your KRT strategy, or conducting a Knowledge Scan

The Retention Triage plot

Time needed to transfer knowledge	Long	Too much knowledge, too little time •Prioritise •Interviews, debriefs	Lots of knowledge, enough time •Take strategic view
	Short	Little knowledge, Little time •Act now •Prioritise on content	Plenty of time •Introduce KM remove the problem
		Short	Long
		Time Available	

The knowledge retention strategy is an unusual strategy, in that it is largely driven by urgency. The knowledge retention and transfer approach that you apply depends on the circumstances and specifically how much time you have available. The strategy is driven by Triage as much as by anything else.

Each of the high-graded knowledge retention areas should be plotted on the Boston Square shown above. The two axes to this square represent the time it will take to transfer the knowledge, and the time available for transfer.

Where the time needed to transfer knowledge exceeds the available time (top left), then the retention program is in reactive mode, and the focus is on capturing the knowledge while there is still time. The departing expert works with interviewers and knowledge capture staff to ensure that the most valuable knowledge is captured and documented.

Where the time needed to transfer knowledge matches the available time (top right or bottom left), then the focus is on both capture and transfer, and the departing expert works with their replacements, through coaching and mentoring and through interviewing, at the same time as documenting the crucial knowledge. If there is a lot of knowledge to be covered, then build a [Knowledge Retention and Transfer strategy](#).

Where the time available is significant (bottom right), then the departing expert can be involved in a wider knowledge management role, ideally as the leader of a community of practice and the owner of a knowledge asset. Knowledge can be captured and transferred as part of their normal job, thus reducing the risk of its loss. If these circumstances applied to your organisation, then you don't need a specific

Knowledge Retention Strategy, you need a full [Knowledge Management Strategy](#).

[Contact Knoco](#) for help with Retention Triage

Knowledge Retention and Transfer tactics



[Image from www.jisc.ac.uk/](http://www.jisc.ac.uk/)

There are many ways in which knowledge can be retained and transferred. Some of the most important ones are as follows;

- The leaver can coach and develop their replacement;
- The leaver can create training material for classroom training, examination-based training or simulation training.
- The leaver can document their knowledge as guidance, work procedures or other reference material. Often it is useful to involve a younger member of staff to interview the leaver and to create the documented knowledge. In this case, you need to train the interviewer in the skills of knowledge elicitation;
- A KM specialist can conduct a knowledge debrief, and create a knowledge asset from the leaver's knowledge;

- The leaver can be filmed doing his work, and provide a narration;
- The leaver can take the lead in a community of practice, or take part in a knowledge exchange.

Deciding on the correct tactics to use for KRT is driven by the nature and complexity of the knowledge, and the amount of time and skills you have available.

[Contact Knoco](#) for help with selection of retention and transfer tactics.

The Knowledge Retention and Transfer plan



[Image from ND Strupler](#)

You will need an element of governance in your strategy, so that you can be sure that knowledge retention and transfer are proceeding as planned. The Knowledge Management teams works with the departing expert and their successor to create a detailed plan for knowledge capture and knowledge transfer activity. The plan is owned by the owner, the expert and their successor, and represents a series of activities including knowledge capture, documentation, mentoring, training and coaching.

The plan covers elements such as:

- The list of knowledge topics which need to be retained and transferred;
- The priority given to the topic;
- The preferred tactic and actions for dealing with that topic;
- The date when the actions need to be complete.

Each departing individual, is covered by a single plan. During the retention and transfer activities, the plans are monitored, and the situation is reported to management through a retention dashboard. Management can therefore be reassured that the risk of knowledge loss is being covered effectively.

[Contact Knoco](#) for help with the format of KRT plans, and the process for their creation.

Knoco news



Nick had a good visit to the KM World conference in November, running a workshop (with Patrick Lambe), doing a book signing session, and presenting a talk on "The Knowledge Supply Chain". His next conference is in Kuwait at the beginning of February.

Stephanie wishes to reassure everyone that she is continuing to deliver KM services

following her move to Berlin, and can be contacted [here](#).

Stephanie and Nick's book "[Designing an Effective KM Strategy](#)" is now in its second print run, and is being translated into Chinese.

Nick's next book, "The Knowledge Manager's Handbook" (written with Patrick Lambe) is now complete and has gone to the publishers, with a release date at the end of March.

[Knoco Chile](#) has delivered [3 conferences on Innovation in Education](#) in Mexico for Cobach, a second knowledge management training course for the Venezuelan Oil Giant PDVSA along with Knoco Venezuela, will be delivering a conference in this international seminar "[Neuropedagogy. The new educational paradigm of the 21st century](#)" and are currently developing KM strategies for 2 organizations

[Knoco South Africa](#) launched a new interactive workshop introducing Knowledge Managers to ISO 9001:2015 Clause 7.1.6. Knowledge in November. The workshop facilitated by Ian Corbett in Johannesburg builds on one of Knoco's critical KM success factors - delivering value and benefit to organisations.

The newly revised ISO standard potentially positions Knowledge Managers to proactively support their organisations in delivering quality products of services if they understand how to leverage it effectively. According to Ian the challenge many Knowledge Managers still face is developing

the skill to identify where and how to focus KM and convert activity into value and benefit. The workshop shares insights and transfers skills Ian has developed supporting businesses in different sectors and government organisations to take a more strategic look at creating value-based strategies.

With the economy going through a tough period there's never been a better time to seek ways to use your organisation's knowledge for collective benefit. Want to know more? Contact ian.corbett@knoco.co.za and find out more about how KM can support your organisation in winning and retaining ISO accreditation.

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