

Knowledge Transfer Methods



KNOWLEDGE MANAGEMENT

There are many ways for an organization to identify, store and transfer knowledge. Some strategies will work better in one department than another. The key is identifying and developing complementary ways to further knowledge management and to enable information transfer in an organization.

Knowledge Prioritization:

1. **Best Practice Meetings:** Sessions held by the experts leaving the organization to share best practices, knowledge, and information on a particular subject, program, policy or process, etc. Sessions can be scheduled as 1x1 meetings or with a group. If time allows, collect questions ahead of time to prepare thoughtful responses. Ensure notes are taken.
 - a. **Focus on:**
 - Critical procedural reviews.
 - Thought processes and reasonings in past decisions and projects.
 - Lessons learned.
2. **Communities of Practice:** Designated networks of people who share information and knowledge about a common work practice over a period of time, though they are not part of a formally constituted work team. Communities of practice generally cut across traditional organizational boundaries. They enable individuals to acquire new knowledge faster. They may also be called Communities of Interest if the people share an interest in something but do not necessarily perform the work daily. Best-in-class organizations rely heavily on communities for the purposes of identifying, capturing, and transferring knowledge and expertise.
 - a. **Tool:** [Community of Practice Start-Up Guide](#)
3. **Connecting Key Contacts:** Experts lead introductions to key stakeholders and contacts both internally and externally to the team and organization. This process can be done through informal meetings and emails.
4. **Expert Interviews:** Sessions where one or more people are considered experts in a particular subject, program, policy or process, etc., meet with others to share knowledge. Expert interviews can be used in many ways, including capturing the knowledge of those scheduled to leave an organization, conducting lessons learned debriefings and identifying job competencies. Structured interviews are a particularly thorough method of extracting critical knowledge from employees. In this approach, employees answer key questions as part of a structured dialog to provide a historical perspective and offer solutions.
 - a. **Tool:** [Knowledge Capture Expert Interview](#)
5. **Mentoring:** In mentoring, an experienced, skilled person (mentor) is paired with a lesser skilled or experienced person (mentee), to develop or strengthen competencies of the mentee. Such programs focus on leadership, behavior, and skill development. Tacit knowledge transferred might include orientation to the organization's culture. Explicit knowledge could include specific job tools and processes. A successful mentoring relationship benefits both parties by expanding their knowledge, skills, energy, and creativity. For the purposes of knowledge retention, mentoring programs effectively transfer knowledge from a leaving employee to a successor. The first step is to identify the areas within the organization that may benefit from mentoring.
6. **Lessons Learned Debriefings:** Lessons learned debriefings are a knowledge-sharing approach used to capture

lessons and proven practices from a particular business process, project, or event. These lessons can be applied to improve the projects from which they were derived by identifying efficiencies, reducing risks, and minimize costs across the enterprise. These debriefings also serve to analyze and capture experiences - what worked well and what needs improvement - so others can learn from those experiences. For maximum impact, lessons learned debriefings should be done either immediately following an event or regularly, with results shared quickly among those who would benefit from the knowledge gained.

7. **Storytelling:** Most wisdom in organizations is passed on through storytelling. A story describes what happened in a situation to illustrate a point and effectively transfer knowledge. Most people have heard many stories about their organizations. An organizational story is a detailed narrative of management actions, employee interaction, or other intra-organizational events that are communicated informally within the organization. If you hear "what really happened" in a promotion, demotion, termination, or transfer, you are hearing a story. Storytelling is less structured than critical incidents but can serve the same ends. It can be the most effective way of transmitting wisdom from one person to another. Stories can supply context for organizational successes and lessons learned, and each story has the potential to personalize an issue by bringing it alive for listeners or readers. Stories are also an effective way to bridge generational gaps, communicate important information about an organization's culture, and help employees develop a sense of organizational identity

Documentation:

1. **Documenting Processes:** The documentation of specific and critical work processes and the important elements involved. This can include:
 - a. Operational manuals & procedural steps.
 - b. Key players and contact information.
 - c. Key dates, timelines.
 - d. Relationship to other processes that come before and after.
 - e. Necessary software, data sets, and files names associated with the process.
2. **Document Management:** A consistent, ongoing process that creates a central repository to promote easy sharing, storage, and retrieval of documents and data. This approach to knowledge-sharing increases the likelihood that information will survive, even when the people who generated that information have moved on from their roles.
 - a. **Example:** Create a OneDrive or SharePoint folder to store important documents, files, and spreadsheets.
3. **Knowledge Audits:** Knowledge audits are structured events designed to capture information about specific knowledge areas within an organization. They help to identify an organization's knowledge assets, including what knowledge is needed and available. They provide information on how knowledge assets are produced and shared and where there is a need for internal knowledge transfer.
4. **Knowledge Maps:** These catalog information/knowledge available in an organization and its location. They point to information but do not contain it. An example is an Expert or Resource Directory that lists people with expert knowledge who can be contacted by others needing that knowledge.
5. **Skills Inventory:** Used to generate information about the knowledge and skills an expert possesses. Skills can be written down by the expert and shared with his/her leader. Use the skills inventory to assess what skills will be lost once the employee leaves the organization in order to identify skill gaps in the team and determine possible upskilling needs.
 - a. Identify the skills and competencies that are important to your organization.
 - b. Assess current skills level (test, self-assessment, 360-degree feedback).
 - c. Create a skills matrix to get an overview of the current skills and levels.

Training:

Training encompasses a large variety of activities designed to facilitate learning (of knowledge, skills and abilities or competencies) by those being trained. Methodologies can include classroom instruction, simulations, role-plays, computer or web-based instruction, small and large group exercises, and more. It can be instructor-led or self-directed in nature.

- 1. On-the-Job Training:** Most organizations use some form of on-the-job training where an experienced employee teaches a new person how to perform job tasks. If this happens at random or with no consistent written materials or processes, it is called “unstructured OJT.” A system of structured OJT differs in that specific training processes are written; training is scheduled records are kept of training sessions, and “trainers” are given training on how to do OJT, how to give feedback and several other factors.
- 2. Job Aids:** These are tools that help people perform jobs in real-time. These items include checklists, flow diagrams, reference tables, decision tree diagrams, etc., that provide concrete information to the user and serve as a quick reference guide to performing a task. Knowledge can be stored in aids and accessed through low-tech methods when the need arises. Job aids are not the actual tools used to perform tasks, such as computers, measuring tools, or telephones.
- 3. Job Shadowing Programs:** A job-shadowing program is one strategy by which to transfer knowledge from one person or group to another. A successor or less experienced employee is paired with the departing employee or expert. Job shadowing provides an excellent opportunity for the departing employee or expert to share knowledge (and perhaps hands-on practice) in dealing with the most difficult situations that he or she has faced on the job.

Feedback: Do you have a suggestion for improvement? Please [click here](#) to submit your feedback.
