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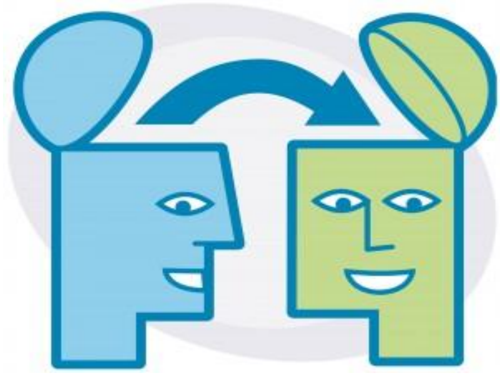
How to Transfer Knowledge



What happens when someone experienced leaves your office? They may have many years of technical, market or customer expertise. How is their accumulated knowledge and know-how captured and transferred to their successor?

In most organisations the process is haphazard. The leaver spends a couple of half-days with someone who will take over from them and they write down a list of key points. Studies show that the effectiveness of this approach is low – something around 40% of the key learnings are transferred. The new person in the role starts out with plenty of enthusiasm and enterprise but makes lots of mistakes that the expert could have anticipated – because they made the same errors years earlier! Experimentation and innovation are good but making the same mistakes time and time again is not.

The aerospace industry has developed a much more rigorous method for knowledge transfer which achieves around a 90% level of effectiveness. Let's say an expert is leaving a department. He or she has many years of know-how. There is a four stage process:

1. The department members as a team draw up a plan for the knowledge transfer with a list of all the important elements as they see them. The expert then adds what they see as important to this plan.
2. There are a number of conversations. More on this below.
3. The knowledge is documented and codified to cover all the points in the plan and others that have arisen in the conversations.
4. People practise some of the important techniques and methods while the expert is still around so that they can ask questions and be coached.

Four roles are identified:

a. The expert
b. The 'nexpert' – the person designated to take over from the expert.
c. Practitioners – more junior team members who may become experts in the future.
d. A facilitator.

The conversations take place in small groups – possibly the expert, the nexpert, two practitioners and a facilitator. These sessions do not consist of the expert spouting forth their wisdom while others simply listen. The conversation is driven by questions – and initially they come from the practitioners. The expert often cannot see the problems, issues and points of view of the inexperienced team members and that is why the initial questioning must come from them. The facilitator encourages the practitioners to ask all sorts of questions and helps to draw out and record the answers. Often the nexpert will give their answer to a question and then the expert will correct them or augment the response. You should allow several weeks for the process. It cannot be left to the last minute. A sound approach to succession planning and knowledge transfer will save time and money.

About the Author:

Paul was part of the team which launched the IBM PC in the UK in 1981. He became MD of database company Ashton-Tate. In 1993 Paul joined MathSoft, publishers of mathematical software as VP International. He became CEO of Monactive, a British software company which publishes software asset management tools. In 2002 he founded his own company, Destination Innovation, which helps organisations improve innovation. He writes and speaks on lateral thinking and innovation. His latest book is The Leader's Guide to Lateral Thinking Skills published by Kogan-Page.

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