

## Knowledge Transfer & My Team

*How do I know if this applies to me?*

### Determining Need & Urgency for Action

You and your team, department or AOR may need to use knowledge transfer if you are at risk for losing important information about how your work gets done. This applies to jobs with few incumbents that contain specialized skill sets, jobs with high learning curves, and knowledge that has to be developed on the job instead of simply hired into the company.

Here's how you'll know if you or your department should be concerned about losing critical knowledge.

“ A unique key thought from a business leader goes on each page/section of the interactive toolkit. Each key thought aims to inspire as the team member moves through the toolkit. ”

*Name and position of business leader*

THE NEED FOR KR (RISK FACTORS)

KNOWLEDGE RETENTION MATRIX

CRITICAL POSITIONS

YOUR READINESS FOR KR

SELECT EXPERTS & TRANSFEREES

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CONTACT YOUR HRC

## Step #1

Contact your HRC and obtain the Workforce Planning information for your department. Your priority should be the people who are retirement eligible over the next three years.

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## Step #2

Click on The Need for KT (Risk Factor Analysis.) Use this checklist to analyze the impact of a given individual. If there is significant impact, you'll want to implement a KT Action Plan (Double Click) for that individual. If you want to plot the knowledge-at-risk for your entire team or department, use the Knowledge Retention Matrix.

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## Step #3

Check the list of Critical Positions to see if any are represented in your area. These positions have been identified as vital to our long-term success. They were chosen because ?are these the reasons? These jobs are essential to executing our business plan, differentiate us from competitive threats, aren't easily obtained from outside sources and are widely recognized in our industry as vital.

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## It Takes Two (at least!) for Knowledge Transfer

Knowledge transfer involves two actions: transmission (sending or presenting information to a potential recipient) and absorption by that person or group. Double click on Tool: Selecting Experts and Transferees to guide your selection process.

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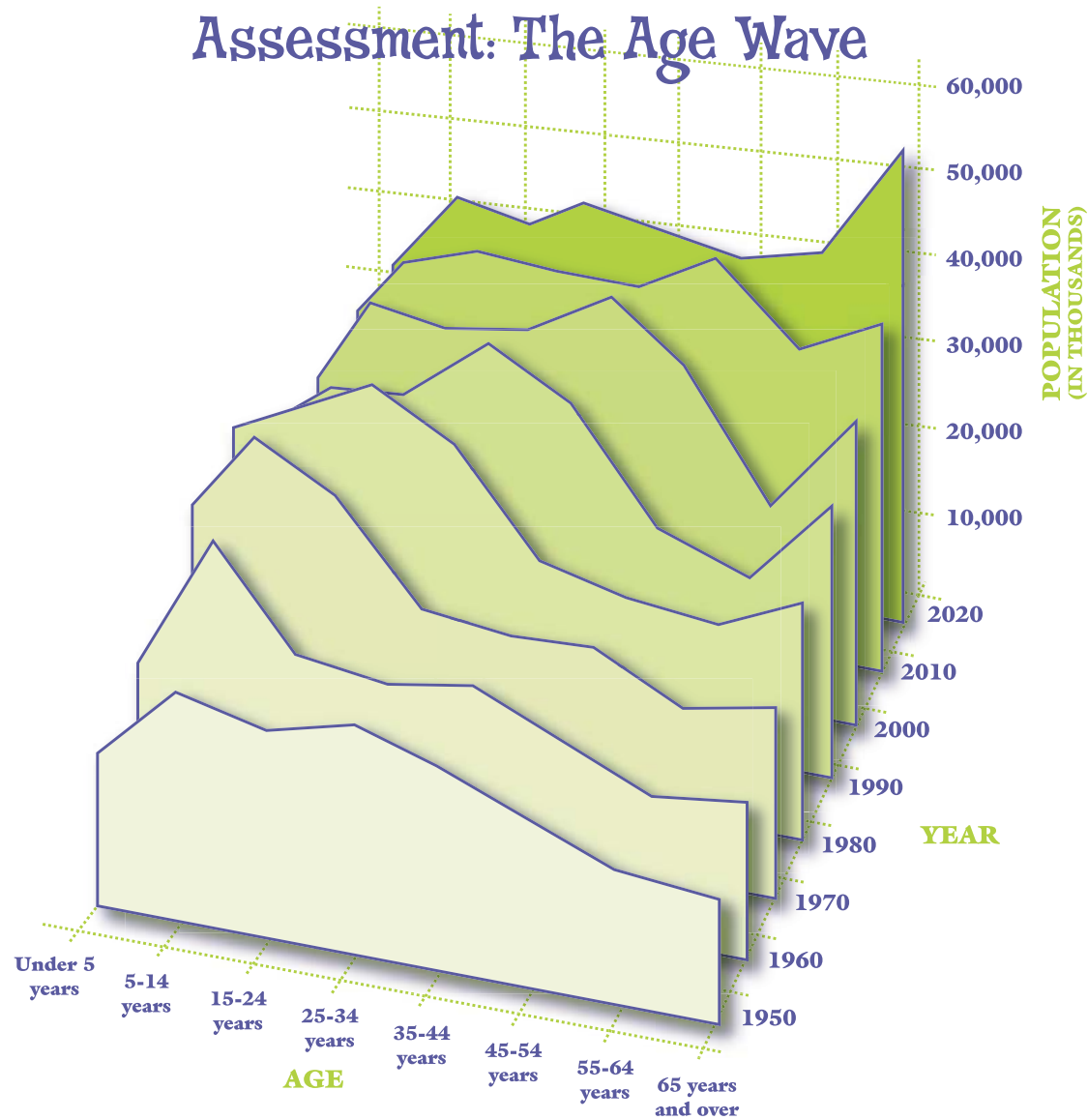
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## Assessment: The Age Wave



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## Assessment: The Need for KT (Risk Factor Analysis)

Will the knowledge set be required within 3 years? If so, select the range on the the scales below to determine the impact. If not consider using contractors to fill the knowledge gap until the requirement becomes obsolete.

### Factor 1: Expert(s) Retirement Horizon

0 pts 3+ Years	1 pts 2-3 Years	2 pts 1-2 Years	3 pts Less than 1 Year
lower risk			higher risk

### Factor 2: Importance of Knowledge

0 pts Important to a specific facility or AOR	1 pts Important to a broad AOR	2 pts Important across company	3 pts Mission Critical to Organization
lower risk			higher risk

### Factor 3: Internal Scarcity of Knowledge

0 pts Ample potential number of transferees	1 pts Sufficient number of transferees	2 pts Limited number of transferees	3 pts No/Extremely limited number of transferees
lower risk			higher risk

### Scoring

12 – 18	High Priority	Immediate action needed
6 – 11	High Importance	Establish plans now
0 – 5	Important	Actively watch position for changing status/requirements

### Factor 4: External Scarcity of Knowledge

0 pts Ample recruiting pool	1 pts Sufficient recruiting pool	2 pts Limited recruiting pool	3 pts Severely restricted recruiting pool
lower risk			higher risk

### Factor 5: Status of Current Documentation or Transfer

0 pts Training/ Documentation is current and complete	1 pts Systematized training/ documentation is in progress and will take less than 1 year to complete	2 pts Ad hoc training/ documentation may be in place or in progress	3 pts Knowledge undocumented; exists in expert's heads
lower risk			higher risk

### Factor 6: Position Learning Curve

0 pts External/internal new hires possess job knowledge	1 pts 1-2 Years	2 pts 2-3 Years	3 pts 3+ Years
lower risk			higher risk

Your Score:

## The Knowledge Retention Matrix

Estimated Timing of Departure	Less than 12		Priority Focus	Urgent Focus
	1-2 Years		Priority Focus	Priority Focus
	2+ Years			
		Important (0-5 pts)	Highly Important (6-11 pts)	Priority (12-18 pts)

Impact of Knowledge  
(from Risk Factor Analysis)

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