Transferring Knowledge Isn’t Just for Nice People

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Agenda

- Need for Knowledge Transfer
- Common Barriers
- Requirements of a good mentor
- 9 Steps to knowledge transfer
- Sample tools from the workshop
- Role you can play
- How to measure success
- Stories from the field
- Questions
The Need

- Onboarding new employees faster
- Sharing best practices
- Kicking off new projects and adding resources to existing projects
- Retiring workers with singular/critical/unique knowledge
- Cross-training to improve flexibility
- Reducing the impact of mid-career transitions
- Speeding recovery after reorganizations, mergers and acquisitions
- Entering new markets and launching new products
Barriers

- I don’t have enough time
- I don’t know what to share or teach (I know too much)
- I don’t want to transfer knowledge (because you’ll lay me off or make me retire)
- I don’t know what the new person needs to know
- We don’t get rewarded for knowledge transfer and there are no sanctions for not doing it.
- I don’t know how to transfer knowledge or even where to begin
- Those younger/newer employers don’t want to learn (learning styles)
- My organizational culture does not support KT
Can Anyone Be Good at KT?

- NO!
  - Must be competent.
  - Must be willing.
  - Being friendly, a good communicator, super organized, readily available, etc. - not required.

- Clear expectations a little process and logical tools are all that it takes.
9 Steps to Transfer Knowledge

Setting the stage

2. Define roles of manager, peer mentor, apprentice

3. Set expectations for relationship, including measurable goals and priorities
Types of Peer Mentors

- **Broad orientation to whole organization**
- **Narrow focus on subject matter (SME)**

Diagram:
- Four silos labeled **S I L O** under a heading labeled **Primary**.
9 Steps to Transfer Knowledge

Setting the stage

2. Clarify rules of engagement including best ways to interrupt, ask questions and send email
Telling About Yourself

- Handshake Email
- Voice mail
- Cell Phone, Pager, Radio, Home Phone
- Instant Messenger
- Open door
- Interruptions
  - Cube/floor etiquette
- “Java factor”
  - Your best time of day to work
9 Steps - Managing the flow

1. Develop a measurable plan for knowledge to be transferred
   - What to know how to DO
   - Questions to PROVE a level of understanding
   - Where to find RESOURCES
# Sample Training Plan

<table>
<thead>
<tr>
<th>Skill</th>
<th>Priority</th>
<th>Measure of Success</th>
<th>Accomplish By</th>
<th>Resources</th>
</tr>
</thead>
</table>
| Enter/update a defect into the bug tracking system |          | 1, 2, 3, 5, 10     | - DevTrack documentation  
- QA Expert  
- resident team Expert  
- EA’s DevTrack training course |                                                                   |
| Add a document to the Sharepoint site      |          | 1, 2, 3, 10        | - sharepoint documentation  
- team admin for sharepoint |                                                                   |
| Check in and out a file from Perforce      |          | 1, 2, 3, 10        | - EA's Perforce website  
- Perforce's official website  
- team Perforce expert  
- EA’s Perforce training course |                                                                   |
| Create a weekly status report             |          | 1, 2, 9, 10        | - team template  
- Peer mentoring course example |                                                                   |
| Run the game on their debug/development kit |          | 1, 2, 3, 5, 6, 10  | - demo from co-worker  
- docs explaining step-by-step |                                                                   |
<table>
<thead>
<tr>
<th>Skills List</th>
<th>Order</th>
<th>Test - be able to explain:</th>
<th>Date</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code tech brief in C++</td>
<td>28</td>
<td>The top 10 vocabulary words</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>The # steps in the process and why each is important</td>
<td></td>
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<td></td>
<td></td>
<td>The top 3 things that often go wrong</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>The relationship between tech brief and code</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Where to find resources (docs, people, samples, websites,)</td>
<td></td>
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<tr>
<td>Build logic in a screen using Action Script</td>
<td>30</td>
<td>The top 10 vocabulary words</td>
<td></td>
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<tr>
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<td>The # steps in the process and why each is important</td>
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<td>The top 3 things that often go wrong</td>
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<td>The relationship between screen and brief</td>
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<td>Where to find resources (docs, people, samples, websites,)</td>
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<tr>
<td>Analyze creative brief</td>
<td>32</td>
<td>The top 10 vocabulary words</td>
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<td>Where to find resources (docs, people, samples, websites,)</td>
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<tr>
<td>Render 3 domain specific elements</td>
<td>34</td>
<td>The top 10 vocabulary words</td>
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<td>The top 3 things that often go wrong</td>
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<td></td>
<td></td>
<td>How to troubleshoot the three most common problems</td>
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<tr>
<td></td>
<td></td>
<td>The first 4 things to check when troubleshooting</td>
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<td></td>
</tr>
<tr>
<td>Write tech brief</td>
<td>35</td>
<td>The top 10 vocabulary words</td>
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9 Steps - Managing the flow

1. Create an outline for discussion in 5 minutes
2. Deliver a technical demonstration in 6 steps
3. Teach with deference to learning styles
The Five Minute Meeting Plan Agenda

1. Explain meeting purpose
2. Explain relationship to job
3. Outline main points
4. Note jargon
5. Identify practice opportunities
6. List other resources
9 Steps - Following Up

1. Ask assessment questions to confirm transfer of knowledge
2. Give peer appropriate feedback
Your Role

What role can you play in supporting knowledge transfer?

- Take out the mystery! Provide language to define roles, expectations and methodology.
- Provide regular training, consulting and ongoing support to make this part of your culture.
- Help analyze the risk and then support systems to methodically reduce the risk.
- Find a place to apply these ideas as a pilot and build some success stories.
- Measure and report on the results.
How can you measure the success of the KT effort?

- Reduce ramp up to productivity
- Reduce turn-over from burnout
- Develop a known pipeline of next generation leaders/managers
- Reduce rework stemming from lack of skills
- Reduce risk by methodically replicating skills of at-risk workers
- Improve morale because communication is better and expectations are clear
Success Stories

- Electronic Arts (EA) – rapid growth affects productivity, quality and morale
- US Army MIST Testing Lab – retiring worker’s departure shuts down a department
- Microsoft Summer Interns – good peer mentor = successful experience
- Copper Mine – reduce safety issues
Questions?

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