

# Knowledge Transfer:

Responding to the Unplanned  
Departure of a Key Resource

Steve Trautman  
Principal & Founder

# Knowledge Transfer Definition

Knowledge Transfer is methodically replicating the

**expertise, wisdom** and

**tacit knowledge** of critical, “chosen”  
professionals in the heads and hands of their co-  
workers.



## CAN WISDOM BE TAUGHT?

You can't replace the wisdom gathered over many years, but you can reduce the amount of time it takes someone to begin acting wisely...

# WHAT is the Big Deal?

**What drives your concern over losing one employee?**

# What Must be Known?

## Linear, Definable

- Processes
- Standards
- Tools
- Templates
- Policies
- Success metrics
- Requirements

Their Secret Sauce!

History

Relationships

Decision Making

Culture

Problem Solving

Tribal Knowledge

# Steps in Emergency KT

- How much time do we have?
- What is the highest priority knowledge to transfer?
- Who will learn?
- What will they learn how to do?
- Transfer Knowledge
- “Pass the test.”

# Knowledge Silo Matrix

Name	Priority:	Silo 1	Silo 2	Silo 3	Silo 4	Silo 5	Silo 6
Person 1	1	4	3	2	4	1	
Person 2							
Person 3							
Person 4							
Person 5							
Person 6							
Person 7							
Person 8							
Person 9							
Person 10							

- Expert to be replicated
- Consistent with expert
- Actively learning
- Not working in that silo
- Risk

# Common Silos - Examples

- Board governance, meeting agendas and materials
- People management
- Business process management
- Overall financial adequacy
- Reinsurance relationships, structure
- Member recruitment (business development)
- Advocacy and political relationships
- Operational oversight
  - Claims and litigation management
  - Underwriting
  - Risk management
  - Marketing and communications

# Breaking the Silo Down

## Three Rules:

- Start with an active verb
- Make sure you can take a picture of someone doing it. You should be able to say, “Go do it.”
- Size the task so you can imagine someone explaining/teaching it in about an hour

# Active Verbs

- Build a relationship with...
- Lead a meeting or project
- Attend a meeting
- Analyze
- Troubleshoot
- Monitor
- Choose/Approve
- Prioritize
- Negotiate
- Escalate/de-escalate
- Evangelize
- Present

# Frame Wisdom as an Answer to a Question

1. What are the steps and why does each step matter?
2. What are the most common mistakes?
3. Who do you have to talk to and why?
4. How do you know when you're in over your head?
5. How do you escalate and ask for help?
6. What are the rules and which ones can you ignore?
7. How do you know if your work is good enough?
8. What should you listen and look for?
9. What are the opportunities for innovation in this task?

# Summary Tips

- Once you have an emergent KT need, start with analyzing how much time you have before he/she isn't available to teach anymore.
- Then pick the silos that are the highest risk.
- Follow with selecting an apprentice for each silo. Remember this could be just a short term “placeholder” person.
- Have the apprentice work with the departing exec to write the list of tasks using the three rules. Add 3-5 test questions to guide the discussion.
- Have the departing exec “teach to the test” with the apprentice taking notes.
- Have the apprentice “pass the test” to prove the notes (and the skills) are clear enough to be used in the future.

# Questions?