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How to Protect Knowledge From Walking out the Door

Guess what George is taking with him?

By Pamela Holloway

You know George. He's the guy everyone calls when they have a problem. George has worked for his current employer an oil company for nearly 30 years and there's very little he hasn't faced when it comes to getting oil out of the ground. Rumor has it he can solve a problem, any problem in 15 minutes or less, and he doesn't have to be onsite to do it.

The good news is you have a tremendous knowledge asset in George. The bad news is he's opted for early retirement. And when George leaves, so does his knowledge.

So why haven't you done anything to protect yourself from knowledge walking out the door? Things move too quickly to afford you the weeks, months, maybe even years it would take to rebuild lost knowledge. Time lost trying to replace key knowledge and more importantly, losses resulting from not having the knowledge there when you need it can cost a fortune, if not cripple your company entirely.

The good news is there's been some real progress in the area of tacit knowledge transfer. It's not only possible to transfer what George knows to other people who need it. It's possible to accomplish it in a short period of time, it doesn't require a huge investment in technology, and it doesn't have to cost you an arm and a leg.

The key is not to try to build an elaborate expert system that you teach to think and solve problems like George. Instead, you want to focus on only those key processes, actions and

behaviors that illustrate how George does what it does (in this example, George solves well problems). You want to capture the steps of the process how, what, when and where he does what he does and deliver this information back in the form of solutions, chunks, or knowledge nuggets that are immediately actionable.

People don't have to leave for you to lose knowledge.

As if it weren't enough that we have to worry about knowledge walking out the door, now we also have to worry about losing it inside the organization. It appears that experts don't have to leave in order for a company to lose their expertise. Sometimes taking another job inside the company can have the same affect.

When people change jobs, the rest of us tend to associate them with the new role and assume that they only know things related to this one job. It's as though we forget about all the other experience they bring to the table.

I remember sitting in a meeting one day when someone said, "If we only we could find someone with international payroll experience." One of the guys on the team came unglued. Prior to his current assignment with the U.S. payroll team, he had spent several years implementing international payrolls. He'd been with the company for many years and had worked with several of the people in the room in previous engagements. He was incensed that no one remembered his international experience or even bothered to ask if anyone had the requisite skills.

One of the smartest things you can do to ensure you know who knows what is to implement a yellow pages type of "find the expert" directory. This is generally a low-cost investment in technology, people and time, but one that can offer a dramatic return on investment. The key in making these programs work rests in the quality of the information provided. It should not include basic bio or r sum -type mentions as much as it should include knowledge and expertise applied. It should be a sort of "who's worked where doing what with what and with whom."

Find the Georges in your organization.

In order to identify the people in your organization whose brain

houses key knowledge, you should start with your business strategies, objectives and core competencies. What is it that you absolutely must do in order to be successful? In the case of George's company, one of the key competencies is resolving well problems quickly and efficiently. Every minute a well's not pumping, the company is losing money.

Try this simple exercise. Think about people in your organization who, like George, have key knowledge in their heads. You'll want to focus on knowledge and abilities that aren't easily available anywhere else or easily replaceable, should the expert decide to retire, pursue other employment or God forbid, get hit by a bus. Take a minute and think about the key knowledge in your organization. It might be:

- Knowledge about and/or a relationship with a particular customer
- Knowledge about a key operational process
- Knowledge about a key technology or system
- Knowledge of a geography or country and its business customs
- Knowledge about how to pick the right person for the right job or how to put together a winning team
- Knowledge about the internal infrastructure the tools, the culture, "how to get things done around here."

Remember: Not everyone in your organization is a George or has the potential to be a George. You don't need to capture and classify everything that everybody knows even if it were actually possible. You have to learn to recognize which knowledge is most important to the success of your organization, who has it, and who would benefit from it most.

Think of five people who have key knowledge in your organization, and how their knowledge is used. Now imagine what it would be like if these five people were no longer around. What would it be like on a day-to-day basis if you

didn't have access to their skills and knowledge?

Sometimes it will be fairly obvious what kind of knowledge is important (for example, knowing where to drill for oil). In many cases, there may be a fair amount of previously existing explicit knowledge that you can use to build the foundation of capturing employee knowledge. Sometimes, the tool may be a manual or a quick-reference card. Other times, an interactive, computer-based training tool might be more appropriate. Video or live telecasts are also good delivery vehicles.

Apprenticeships and mentoring might also be appropriate.

The complexity of the process depends on the nature of the knowledge, where you are today in the process (has any of it been communicated?), how willing the expert is to contribute, and the caliber and skills of people you have to support the exercise.

Maintain relationships after employees leave.

George is looking forward to his retirement. He's buying that ranch he's always wanted and he plans on spending lots of time with his grandchildren time he didn't have when he was up all hours of the night solving well problems. But the door that closes behind him doesn't have to slam shut. George may be interested in staying connected to what he knows best, and may be willing to continue work on an as-needed basis, so long as you're careful to structure the relationship in a way that gives him time for his new priorities and recognizes the value of his expertise.

Employment is no longer an either/or situation where you are employed or not employed. It takes on various forms including contracting and consulting, and may be part-time or every once in a while. The key is to make sure that when employees leave or change their employment status, they do so on good terms. Make a conscious effort to maintain relationships with former employees not just with retirees, but with people of all ages who have worked for the company.

Think about it. When people leave your company for another job, chances are they'll be doing new things that increase their knowledge. They'll certainly have more external exposure, meet

more people, use different kinds of technology, and so on. The knowledge they acquire could well prove useful to you at some time in the future.

Imagine a younger version of George who is potentially as knowledgeable, but you aren't able to give him or her the exposure to the full range of problems and geographies that another company could. George Jr. goes off to a new job or a few jobs for several years, and comes back to you later in his career with just the right knowledge at the right time.

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