

The Rise of the Knowledge Mentor

Accelerated apprenticeships can help preserve deep smarts • BY DOROTHY LEONARD



Dorothy Leonard is professor emerita at Harvard Business School and chief advisor for the Leonard-Barton Group. To comment, email editor@CLOmedia.com.

Organizational learning involves not only bringing in new skills and capabilities, but also identifying and preserving the business-critical, experience-based knowledge — what we call deep smarts — that underlie current operations and innovation.

This expertise resides with highly experienced managers, technical experts and employees who may not be recognized as experts, yet have know-how and skills essential to the business. Every time a deeply smart employee retires, is promoted or leaves for a competitor, knowledge is lost.

Much of deep smarts is implicit — organized in the expert's mind but not documented — or tacit — also undocumented but usually unarticulated and often unrecognized by its possessor. You see it in an individual's ability to size up a situation quickly, mentally embed it in a larger system context, apply judgment and make a wise decision. Such knowledge is exceptionally valuable because it is based on experience and difficult to replicate.

A primary challenge for chief learning officers is to create enough bench depth in those deep smarts and to retain them when highly experienced employees leave. One powerful tool can help: knowledge mentoring, or an accelerated apprenticeship. Ideally, this highly structured and measurable process should be employed over several years. But benefits accrue using it for even a few months. If the opportunity is shorter, structured interview templates are more appropriate.

This accelerated knowledge transfer process, or OPPTY — Observation, Practice, Partnering and Taking responsibility — is based on research about how people learn and the findings undoubtedly familiar to CLOs. Problem-solving skills, judgment and know-how inherent in deep smarts are often rooted in decades of experience, but much of that expertise can be transferred to less-experienced employees. A surprising amount of deep smarts can be replicated using a contract between incumbent experts and learners involving carefully selected “mini-experiences.”

For example, a deeply smart sales director in a beer company was often called upon to negotiate with the distributors upon whom much of the company sales rely. His success in such dealings came from driving a truck for a distributorship for a few years. This gave him an unusual perspective on distributors' operations and finances.

Obviously his successor, who lacks such experience,

cannot spend a year driving a delivery truck. But he could spend a couple of weeks in a distributorship. Or he can take on other experiences to transfer critical thinking and problem-solving approaches.

CLOs can build such mini-experiences into individual development plans that include learning goals specific to the skills to be transferred. Thus, knowledge mentoring differs from traditional mentoring.

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- The agreement between knowledge mentor and learner is focused laser-like on the deep smarts at risk or that are scarce in the organization — not generic skills.
- The responsibility for the transfer resides with learners. In addition to helping set the tasks and goals in the individual action plan, successors are trained to pull the knowledge from more experienced individuals.
- Mentors and successors are accountable for delivering on the goals and specific tasks set out in action plans. The successor keeps a structured learning log of mini-experiences. The log also stimulates a periodic reassessment of progress and of what further experiences are needed to meet the goals.
- A process coach monitors progress in the process and removes organizational obstacles. Coaches also analyze and measure knowledge gap closure.

Knowledge transfer is most effective and efficient if the gap between the experts and learners is not too large. Recipients of deep smarts need some foundational knowledge to internalize the mini-experiences. Therefore, masters are better matched with journeymen or advanced apprentices than with novices.

Ideally, knowledge transfer is embedded in the organization's DNA, formally as part of succession planning and promotion requirements, and informally as an organizational norm. But few CLOs and other top executives do much to stem general knowledge loss because of employee movement. That needs to change, or deep smarts will keep walking right out the door. **CLO**